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ABSTRACT

This guide was designed for use by marketing education teacher-coordinators and administrators in implementing marketing education programs. The document includes the following: an overall picture of administrative responsibilities related to high quality programs, guidelines and forms needed to deliver effective instruction, resources and information regarding Distributive Education Clubs of America (DECA) chapter management, and professional development opportunities. The essential elements for each course are referenced to the textbooks adopted in Texas and to Texas resource centers. The guide is organized in four sections. The first section describes the responsibilities of marketing education teacher-coordinators and refers to sample forms and procedures located elsewhere in the guide. The second section explains what should be taught in each marketing education course and where and how mastery is to be documented; it also provides correlations to the curriculum guide for marketing education and other resources. The third section provides information for developing and managing local DECA chapters and participation in district, state, and national levels of the program. The final section focuses on opportunities for marketing education teachers to grow professionally. Three appendixes include rules and regulations and program evaluation suggestions, forms, and a suggested filing system. (KC)

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Program Management Guide

for Marketing Education

ED 361 559

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Skills that last a lifetime!

Marketing Education
PROGRAM MANAGEMENT GUIDE

By

Betty Blair
Suzanne Faught
Eleanor Holderman
Brenda Simmons

Published by

The University of Texas at Austin
Educational Resources
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Entries in this section explain what the ME teacher must do (*mandates*) and should do (*guidelines*) to have a quality program, along with references to a number of sample forms and procedures included elsewhere. Includes list of teacher-coordinator duties for all four areas of responsibility.

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Entries in this section explain the various opportunities available to the ME teacher for continual growth on the district, state, and national levels.

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Foreword

Operating a program of high quality is the goal of almost every teacher of Marketing Education. It is because of that goal that this publication was developed. Four Marketing Education teachers spent many, many hours planning, gathering information, discussing, editing, starting all over, agreeing, disagreeing, laughing, and caring as this *Program Management Guide* was developed. And the original idea for this publication came from these same four teachers. Please join me in saluting and thanking them for their unselfish contribution to the betterment of Marketing Education.

There is a wealth of valuable information in this publication. There is basic information that reflects the relationship of the Texas curriculum and the National Curriculum Framework which was developed to assist states plan their own curricula. The important thing to remember is that such information as well as well-planned lesson plans, learning activities, rigor, and multiple assessment practices will lead you to equity and excellence for all your students.

Give the materials in this guide a try. The writers will be the first to tell you to modify anything with your own good experiences if it will make you a more effective manager of learning and training for your students.

Change has become the order of the day. The educational and training needs for the real world will change at a faster rate than at any time in history. You will always have the same amount of time that you already had, but you will be expected to perform and accomplish more. Use this publication to help you be more organized and efficient.

You expect the best for and from your students, and they expect and deserve the best from you. Hopefully, this *Program Management Guide* will help all of you be winners. There are a lot of people pulling for you!

Respectfully yours,

Berry Sullivan, Director
Marketing Education Programs
Texas Education Agency

About the Authors

The four Marketing Education professionals who developed this guide brought to their task an impressive array of experiences, education, and talents. In addition to classroom experience, their backgrounds include service to students and the teaching profession.

Eleanor Holderman, who led the effort and kept it moving along despite a busy school year, is currently in her eleventh year of teaching Marketing Education at Woodville High School in Woodville, Texas. She has a Bachelor of Business Administration from Baylor University, as well as a Master of Education from Stephen F. Austin State University. Her business experience includes 10 years as owner/manager of Holderman Real Estate and Building Companies, plus three years of experience in casualty insurance underwriting.

Her students have been successful as DECA members in district, state, and national events. They have traveled as participants and contestants in National DECA events for four years, and one student served as a state officer.

Professionally, Mrs. Holderman has served as an officer of the Marketing Educators of Texas (MET), member of the DECA Board, and district director. She has also been a member of the Marketing Education Curriculum Advisory Task Force (MECATF), and the Project Advisory Committee (PAC) to EIMC-Educational Resources, the University of Texas at Austin. She worked on the Texas Education Agency Curriculum Review Project for four years.

As a member of PAC, Mrs. Holderman was a major contributor to the *Marketing Education I* guide published by EIMC/UT Austin in 1988. Then in 1990 she contributed material for the EIMC publication *Higher Level Thinking in Marketing Education.* That same year Mrs. Holderman was coauthor of a leadership training manual, *Destination: LEADERSHIP*, also published by EIMC.

She has served as a codirector of the DECA National Leadership Development Academy for three years, most recently at the 1992 Anaheim conference. She has been a presenter at professional conferences held for new and returning marketing educators and school administrators.

Betty Blair has also been a significant contributor to Marketing Education since she became an ME teacher-coordinator at Dumas High School—including being elected the Outstanding Texas Marketing Educator for both 1989 and 1992. She was recently named "Marketing Teacher of the Year" for District 4 of the American Vocational Association. In the field of curriculum development, Mrs. Blair has been a member of MECATF for seven years. She also had a major role in the development of the *Marketing Education I Curriculum Guide*, published in 1988. She contributed content to the publication *Higher Level Thinking in Marketing Education,* and has served as a writer of DECA competitive events, the latter at the University of Houston.

Mrs. Blair received her Marketing Education certification from the University of Houston. She is a certified trainer for METS (Model for Effective Teaching and Supervision). Her undergraduate education included two years at Texas Woman's University, followed by a Bachelor of Science from Texas Tech University. Her graduate work was done at West Texas State University, Eastern New Mexico University, and Tarleton State University. Her teaching experience includes eleven years in Marketing Education and six years teaching elementary reading.

Brenda Simmons also brought a diverse background to the development of the *Program Management Guide*. She is currently a teacher-coordinator for Marketing Education and Home Economics Cooperative Education at Sterling High School, Baytown, but before that was a Marketing Education teacher-coordinator for fourteen years at Dayton High School. Also at Dayton she taught homemaking for four years. She taught the same subject at Colorado High School for one year.

Mrs. Simmons' Bachelor of Science in home economics education/clothing and textiles was received in 1972 from Texas Tech University. She holds a 1984 Master of Vocational Education from Sam Houston University. Mrs. Simmons has Marketing Education certification

from the University of Houston, and Vocational Administrator certification from Sam Houston State University. She has been a member of the DECA Board of Directors and has also served as a member of MECATF.

Suzanne Faught received her Bachelor of Science in education, with a double major in speech pathology and elementary education, from Southwest Texas State University in May 1978, only to begin her Marketing Education teaching experience that fall under emergency certification. Twenty-seven college hours later, Mrs. Faught received certification from Angelo State University. She is currently in her fourteenth year as the Marketing teacher at Lampasas High School.

Mrs. Faught brought to her classroom two years of experience in retail sales and radio advertising. In 1980, her husband Joe, a 1964 graduate of the Lampasas "DE" program, opened a flower shop, and she learned about the rewards and pitfalls of small business ownership. As a result, she can give her students the benefits of firsthand experience from both the employee and the management viewpoints.

Over the past fourteen years, Mrs. Faught has been an active DECA advisor and has taken local student-members to eight National DECA CDCs and four Southern Region Leadership Conferences. She has had three students serve as state DECA officers, and three as area/district officers. Additionally, she has been a member of the DECA Board of Directors, its vice-president, and its president-elect.

Mrs. Faught has been a District 5 director since implementation of the district concept. She has welcomed the opportunity not only to share what she has learned through her experiences, but also to learn from both new and experienced Marketing Education teachers—in order to make her classroom one in which her students find success.

In an effort to learn more about the content of Marketing Education, Mrs. Faught became a member of MECATF, has served on numerous PACs, and was involved in developing the curriculum guide for *Retail Merchandising* in 1988. As a direct outgrowth of involvement in curriculum development, Mrs. Faught began the two-year Model Program Internship program offered through the MarkED Resource Center. As she and Mrs. Holderman worked through the task of analyzing their own ME programs, the need for the present guide surfaced and became the driving force in seeing the publication through to its completion.

The development of the publication required hours of discussion among the four, establishing what should or should not be included. In addition, they sought and received recommendations from other marketing educators at the Professional Improvement Conference, the annual meeting of MECATF, and meetings of PAC. They have also thoughtfully provided a feedback form in Appendix B of this guide, so that future editions may be refined to fit changing circumstances.

Jim Cockrum
Marketing Education Curriculum Specialist

Acknowledgments

The *Marketing Education Program Management Guide* was prepared by the authors with the coordination of Berry Sullivan, state director of Marketing Education at the Texas Education Agency, and Jim Cockrum, Marketing Education curriculum specialist for Educational Resources, Extension Instruction and Materials Center, The University of Texas at Austin. Other professional educators also contributed.

Special credit is due these local school administrators:

- Larry Dickerson, business manager, Kountze I.S.D.
- Dorman Jackson, superintendent, Woodville I.S.D.
- Gene Riggle, high school principal, Woodville I.S.D.

These Marketing Education professionals were especially helpful in providing ideas and insights:

- Jana Darling, teacher-educator, Southwest Texas State University, San Marcos
- Larry Russell, ME teacher-coordinator, Clear Lake High School, Houston
- Betty Helton, ME teacher-coordinator, McCallum High School, Austin

The Marketing Education Curriculum Advisory Task Force also assisted by reviewing the concept and proposed content for the guide. MECATF includes Jana Darling, Larry Russell, and Betty Helton, as well as these persons:

- Dr. Marcella Norwood, teacher-educator, University of Houston
- Fran Gore, ME teacher-coordinator Brenham High School
- Nelda Shipp, ME teacher-coordinator, Mineola High School
- Sheryl Lynn Nelson, ME teacher-coordinator, Tuloso-Midway High School, Corpus Christi
- B.J. Caffey, ME teacher-coordinator, Comanche High School
- Chris Huffman, ME teacher-coordinator, Brady High School
- Kris Gossom, ME teacher-coordinator, Wichita Falls High School
- Adell Morton, ME teacher-coordinator, Allen High School
- Sandra Telles, ME teacher-coordinator, Coronado High School, El Paso
- Al Mozisek, ME teacher-coordinator, Winston Churchill High School, San Antonio

Additional attention came from the Project Advisory Committee, which meets twice a year to provide guidance to EIMC-Educational Resources, The University of Texas at Austin. Its members included Caffey, Darling, Russell, Helton, Norwood, Morton, and Mozisek. Members of the Texas Education Agency staff who met with PAC were Berry Sullivan, Emmett Eary, and Ward McCain.

Introduction

This publication provides a central source of information for use by Marketing Education teacher-coordinators and school administrators in implementing effective Marketing Education programs for students. The document includes an overall picture of administrative responsibilities related to quality programs, guidelines and forms needed to deliver effective instruction, resources and information regarding DECA chapter management, and professional development opportunities.

The essential elements for each course are referenced to the state-adopted textbooks; educational products from EIMC-Educational Resources, The University of Texas at Austin; and the MarkED LAPs to be used with state-adopted curriculum guides, also produced by Educational Resources. References for compliance with State Board of Education Rules, together with a wide variety of program operation forms, filing system suggestions, and clip art are also provided.

The information found in this publication may be used by teachers and administrators for interpreting the scope of the Marketing Education program to parents, advisory councils, teachers, and students themselves. It is an excellent single resource for teachers who are developing and implementing a Marketing Education program.

This publication is structured so that revisions and other newly developed information may be easily inserted. Users of the *Marketing Education Program Management Guide* are invited to submit ideas for inclusion in future updates. A form for this purpose is included in Appendix B.

The following Mission Statement for Marketing Education was developed by Professor Harland E. Samson of the University of Wisconsin–Madison and validated in conjunction with the 1984 National Curriculum Conference sponsored by the Marketing Education Resource Center. It has been published in various documents by both MarkED and the Marketing Education Association.

> *The mission of Marketing Education is to develop competent workers in and for the major occupational areas within marketing, to assist in the improvement of marketing techniques, and to build understanding of the wide range of social and economic responsibilities which accompany the right to engage in marketing businesses in a free enterprise system.*

Essential to the implementation of the mission are six fundamental premises:

1. The discipline of marketing is the content base for all instruction.
2. Instruction will be offered to all persons and in whatever settings necessary to meet community needs.
3. Programs will deliver a range of instruction covering functional skills, career competency development, and operational management.
4. Instruction will stress application to and direct involvement with marketing businesses and be carried out by a variety of methods.
5. Professional personnel in the field of Marketing Education will have training in Marketing Education and possess business experience in marketing.
6. Where offered, Marketing Education will be considered an integral part of the institution's educational program, with direction and counsel coming largely from a business community advisory group.[1]

[1] The Mission Statement and associated premise statements are used with permission of James R. Gleason, Ph.D., president of the Marketing Education Resource Center, Inc.

Section I: Administrative Responsibilities
of the Marketing Education Teacher-Coordinator

Marketing Education Teacher-Coordinator Job Description
Program Management Reports
Recruitment
Documentation of Program Management
Specialized Wage Regulations
Substitute Teacher Outline
Substitute Teacher Guidelines

Marketing Education Teacher-Coordinator Job Description

The local school district expects the Marketing Education teacher-coordinator to operate a quality program within the state standards as appropriate to the individual community. To accomplish this result, there are literally thousands of tasks which can be grouped into four major categories—administrative, instructional, chapter management, and professional. Vocational teaching assignments may be made for 10-, 11-, or 12-month periods, or for any fraction thereof. Ideally, in addition to instructional period assignments, an ME teacher-coordinator would be scheduled with two consecutive periods for coordination responsibilities, and one conference period for planning and parent conferencing.

This guide is organized around the four basic types of duties of the ME teacher-coordinator—administration, instruction, DECA chapter management, and professional development.

Administration

Administrative duties involve a wide range of tasks relating to compliance with current State Board of Education (SBOE) rules, regulations, and guidelines, as well as those of the local school district and individual campus. State rules relate to such tasks as the selection of appropriate training stations and placement of students, management of a program budget, and preparation of annual reports. ME teacher-coordinators may be assigned such additional local administrative duties as class sponsorship, hall monitoring, committee membership, and record-keeping.

Instruction

Instructional duties include the teaching activities that occur in the ME classroom, and supervision of on-the-job training. ME teacher-coordinators must develop a Permanent Student Record, which includes a Training Plan and a Competency Profile for each ME I and ME II student. Subsequently, the student's mastery (or nonmastery) of each essential element and occupational skill for the prescribed course and career objective must be documented. Although extensive profiles are not required for students enrolled in the cluster courses—Principles of Marketing and Retail Merchandising—documentation of mastery for each of the course essential elements must be recorded for each student. Using the curriculum guides from EIMC-Educational Resources, state-adopted texts, and other miscellaneous resources, the teacher-coordinator must develop the following items for each course taught: an instructional plan for the year, a calendar of study for each grading period, lesson plans for each week, and materials necessary for each class period.

DECA Chapter Management

Chapter management duties involve the organization and supervision of DECA activities. Member activities on the local level involve civic projects, sales projects, social activities, leadership training, and organizational activities. Additional opportunities for the ME teacher-coordinator who serves as DECA advisor include sponsoring student travel to district, state, and national conferences. Students who join DECA may be coached in preparation for competitive events, and may be supervised through the conducting of chapter projects for competition.

Professional Development

Professional development is viewed as an opportunity, rather than a duty, for the ME teacher-coordinator. In addition to serving as a professional organization officer, teacher-coordinators may serve on committees related to curriculum development, in-service conferences, and student

leadership training. At Professional Improvement Conferences, teacher-coordinators often share successful strategies and materials in concurrent sessions, and serve on project advisory committees. Along with local and state opportunities, teacher-coordinators are encouraged to participate in national conferences such as the Marketing Conclave, which includes many activities sponsored by the Marketing Education Association.

Effective time management is essential for success as a Marketing Education teacher-coordinator. A sample flowchart is shown as figure 1. A conveniently copied version of the actual chart in Appendix B has six pages which list many routine tasks—with suggested or typical windows of time for performing each task. Space is provided for including locally assigned tasks. The sample illustrates a typical 11-month calendar with weekly blocks beginning in late July. In use, the form is spread across two pages, a left and a right, to visualize the entire year. **(See form "Marketing Education Teacher-Coordinator Duties.")** This form is also in Section III, Chapter Management, in this publication for use in planning DECA activities.

A number of other sample forms have been included in this guide to assist in accomplishing the required tasks. Some are for special areas, such as DECA chapter management and job interviews and placements. These forms are compilations of those used by successful ME teacher-coordinators across the state.

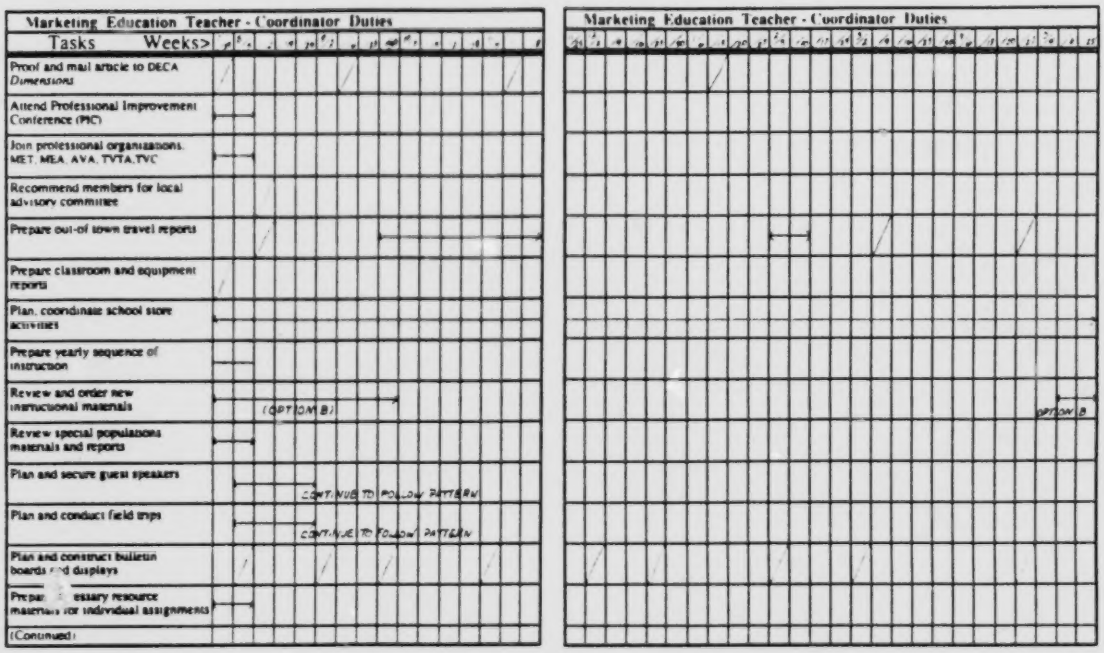

Marketing Education Teacher - Coordinator Duties
Tasks
Weeks>
Proof and mail article to DECA Dimensions
Attend Professional Improvement Conference (PIC)
Join professional organizations. MET, MEA, AVA, TVTA,TVC
Recommend members for local advisory committee
Prepare out-of town travel reports
Prepare classroom and equipment reports
Plan, coordinate school store activities
Prepare yearly sequence of instruction
Review and order new instructional materials
(OPTIONAL)
Review special populations materials and reports
Plan and secure guest speakers
CONTINUE TO FOLLOW PATTERN
Plan and conduct field trips
CONTINUE TO FOLLOW PATTERN
Plan and construct bulletin boards and displays
(Continued)
Marketing Education Teacher - Coordinator Duties
OPTIONAL

Fig. 1. Time management can be more efficient using two-page calendar spreads, such as these sheets developed by a Marketing Education teacher-coordinator. A complete version of the five-page sample is in Appendix B. Consulting it will help teachers plan their years. Appendix B also provides a blank form for teachers developing their own yearly calendars, as well as forms for specific areas of responsibility.

Program Management Reports

Budget

Local district guidelines will determine the amount of funds available and the schedule and procedures for submitting budgets. Requests are generally prepared in four major areas: consumable materials and supplies, program improvement items, teacher travel, and vocational student organization needs.

Consumable materials and supplies could include, but not be limited to, workbooks, printed forms, supplies for course projects, or brochures for program promotion among prospective students and training sponsors.

Program improvement items should focus on meeting needs of special populations and might include, but not be limited to, computer hardware and software, calculators, manipulatives, audiovisual equipment and programs, and individualized curriculum items. The state provides textbooks for each ME course. However, additional resources are available and should be selected for use.

Teacher travel budgets vary widely within the state, but generally provide basic opportunities to attend annual professional improvement conferences, as well as student leadership and competition activities at district, state, and national levels.

DECA activities will be discussed in detail in Section III, Chapter Management, in this guide; however, it should be noted that many districts provide funding for some portion of student travel. Where this opportunity exists, budgets must be developed for local district funds and for chapter funds.

A budget-planning worksheet is included in Appendix B. **(See form titled "Budget Worksheet.")**

PEIMS—Head Count

The Public Education Information Management System (PEIMS) is a computerized database currently being used for reporting student membership or enrollment in local districts to the Texas Education Agency. Each student enrolled in a Marketing Education course taught through the cooperative delivery method must be assigned a code number that reflects the appropriate occupationally specific category for training. Students enrolled in Marketing Education cluster courses are reported under the appropriate course code number. These course and occupationally specific code numbers may be found in Section II in this guide. Within the first two weeks of school, the teacher-coordinator should prepare and furnish to the vocational administrator a master head count list. For each cluster course, the list should include the following entries:

- Course name shown on student schedule (if different from official TEA course name)
- Period course is taught
- Official TEA course name
- Official TEA course code number
- Names of students enrolled in the course

For each cooperative education course, the above list should be prepared and supplemented with the occupationally specific code number for each student. Any changes in enrollment in cooperative education courses will require an update of the PEIMS database, so the teacher-coordinator should prepare and submit an updated master head count list.

Follow-up and Annual Application

Forms for these reports are sent from TEA to the local district in the spring of each year and must be completed and filed no later than July 1.

Although districts have varying systems for collecting and reporting follow-up information, often the Marketing Education teacher-coordinator is given responsibility for gathering and submitting information on his/her former students identified as "completers." Completers are those students who completed a vocational occupationally specific course and graduated from high school. The required information may be obtained by mail or over the telephone. In cases where the graduate is found to be employed full-time, additional information is taken from the current employer. Follow-up records are retained by the local district for a minimum of five years.

The annual application must include all course names (both occupationally specific and cluster courses) and code numbers that will be offered in the coming year. Courses applied for and offered are not necessarily required to be taught; however, a course not applied for may not be taught without an amendment to the annual application.

Program Evaluation

As a part of the district and campus five-year plan, the Marketing Education program shall be evaluated annually. All vocational programs designed to prepare students for gainful employment are evaluated according to the degree of meeting the following criteria:

- Existence of realistic opportunities for gainful employment
- Suitability of students for training and success in occupations of the program
- Effective instructional delivery and student mastery
- Cost-effective operation of programs
- Effective student placement in further training or employment

Although there is no standard form for program evaluation, a commonly used one is included in Appendix A, Rules and Regulations. **(See "Marketing Education Self-Evaluation for Local Programs and Courses.")**

Extended Contract

Many districts employ Marketing Education teacher-coordinators through extended contracts covering more than the basic 10-month school term. In such cases, it is helpful and often required for the local administrator to be provided documentation regarding use of the extended time. In some cases, both general program management objectives and specific time usage are documented. Forms for reporting expected and actual usage of extended contract time are included in Appendix B. **(See "Extended Contract Worksheet" and "Extended Contract Documentation.")**

Vocational Compliance Monitoring

Staff or designees from the Texas Education Agency conduct vocational compliance monitoring visits to determine whether state and federal guidelines are being followed in vocational programs. When a district is scheduled for compliance monitoring, notice is given, and a monitoring instrument is mailed to the district several months before the scheduled visit. The instrument is designed to lead the district personnel through a premonitoring routine in order to have all documentation in place and to facilitate a smooth monitoring visit. In Appendix A, Rules and Regulations, is a list of items typically included in the monitoring instrument. **(See "Preparation for Vocational Monitoring.")** Each year the monitoring instrument is subject to modification; therefore, it is essential to work with the current instrument when preparing for a monitoring team.

Recruitment

Recruitment is to the Marketing Education Program what promotion is to Procter and Gamble, General Motors, or Exxon. By focusing on the needs and wants of our students (customers), we discover the most effective approach for demonstrating and selling the qualities of our specific courses (products), and thereby develop a field of satisfied customers who contribute to the success of our program (business).

In keeping with this analogy, consider recruitment activities as parts of a promotional campaign needing to be balanced with the best promotional mix. The following strategies are presented as thought-starters from which individualized campaigns may be developed. Course offerings vary among districts, and recruitment must be tailored to feature cooperative, laboratory, and cluster courses. Further, DECA activities and opportunities should be included as appropriate within each district. The teacher-coordinator should keep the needs of local students as the primary focus while communicating with the various target audiences involved in student scheduling decisions. Please refer to the sample Application/Co-op Agreement form in Appendix B for a suggested statement of equal opportunity which should be included in all promotional materials. **(See "Marketing Education Program Application" in Appendix B.)**

By developing a professional ongoing promotional campaign, the teacher-coordinator uses the principle of repetition to its best advantage. A combination of timely special events and routine procedures will establish a quality image for the Marketing Education program in the minds of prospective students and those who support the students' decisions.

Product

The foundation for any promotional campaign is a quality product offered at a reasonable price and in a timely manner. In view of the current national focus on quality production in our marketplace and in our educational system, it is clearly evident that instruction in the discipline of marketing is both timely and appropriate among all high school students. It further appears that through one of the instructional delivery systems (cooperative, laboratory, or cluster) the needs of any student can be met at a reasonable price.

Target Audiences

Although the goal is to enroll prospective students in the Marketing Education program, others who play a significant role in the student's ultimate decision include guidance counselors, vocational administrators, general administrators, parents, prospective training sponsors, friends, and former students in Marketing Education courses.

Visual Merchandising

The physical environment of the classroom, display windows, school store displays, and awards/trophy cases should always invite attention and leave a distinct message that differentiates Marketing Education from other vocational or general departments of the school. The following strategies are helpful in getting target audiences into the marketing environment: school store in or near the classroom, open house for parents/training sponsors, guest speakers (business, teacher, student, parent), career planning workshops, displays of student project results, and planning meetings for joint projects with other student groups.

Advertising

Throughout the year, posters and PA announcements may be used within the school to feature marketing career opportunities, marketing course offerings, DECA chapter activities, and

individual student accomplishments. Posters featuring instructional concepts may be purchased from curriculum providers. Sponsors of DECA competitive events provide complimentary posters to affiliated chapters. Videotaped promotional spots appropriate for television Public Service Announcements are available through DECA and MEA.

Sales Promotion

The Marketing Education Association has developed a complete line of promotional aids which, when distributed effectively, help to solidify the professional and distinctive image of Marketing Education. A few of the items available include brochures for various audiences, banners, presentation folders, three-ring binders, lapel pins, certificates of recognition and appreciation, and coffee mugs. These aids are featured in a catalog available from the association at the following address or telephone number:

Marketing Education Association
1375 King Avenue, Suite 1-A
P.O. Box 12208
Columbus, OH 43212-0208
1-800-448-0398

When used by students, presentation folders and binders present a continuous, professional image among their classmates and parents. These items plus the lapel pin also attract positive attention when taken and worn by the teacher-coordinator into the training stations on coordination visits. Training sponsor decals placed in store or office windows also help to provide community recognition for the business, the student, and the program. Career Days provide great opportunities to use banners and brochures. Mugs make attractive appreciation gifts for teachers, employers, or guest speakers.

In addition to MEA sales promotional items, DECA and the Texas Education Agency also provide many image builders. Specialty items such as locally personalized T-shirts, notepads, mugs, caps, pens, and pencils are often used as appreciation gifts. National Vocational Education Week is an ideal time to use these items during cosponsored assemblies, career fairs, appreciation events, and open houses.

Public Relations

DECA activities are the most natural opportunity for providing valued services to the school and community and thereby attracting publicity and support. The current DECA Guide lists various chapter and individual projects, along with guidelines for conducting and measuring the effectiveness of each project. Students enthusiastically involved in application of marketing principles always leave a positive impression with those they encounter.

In addition to large-scale chapter projects, there are many opportunities to join forces with other campus groups to meet local needs. Chapters are often complimented and rewarded for their organizational skills by being invited to sponsor support activities at major school functions. Examples of such activities include carnival booths, concession stand management for special events, leadership seminars, and courtesy corps assistance. Individual students receiving recognition or applying for jobs or scholarships may give Marketing Education/DECA as a reference.

Personal Selling

Students, parents and teacher-coordinators alike are called on to give feature-benefit presentations to the various target audiences. Students and parents are generally involved in informal social discussions, but should not be overlooked as presenters for recruitment open

houses. Prospective students and their parents will often identify and communicate more easily with a peer than with a school official.

One of the most vital relationships to be developed is the one between teacher-coordinator and guidance counselor. It is essential that the Marketing Education program be understood as one able to prepare students for a complete range of post-high school marketing career opportunities. An articulate demonstration of how Marketing Education courses taken in high school mesh with degree plans from 4-year universities, 2-year colleges, and technical on-the-job training is necessary. Specific success histories of recent graduates of the ME program should be continually and diplomatically called to the counselor's attention. With carefully laid groundwork, counselors can become ardent supporters of Marketing Education. Ideally, an annual plan for recruiting would include counselor-sanctioned ME program presentations to eligible students and their parents. Please see sample parent night invitation in Appendix B. **(See form beginning "You are cordially invited...")**

Documentation of Program Management

Training Stations

The nature of cooperative education involves the coordination of classroom instruction in marketing concepts with approved occupationally specific on-the-job training.

Official training stations may be business, industry, or governmental agencies that provide a broad range of curriculum-related training experiences for the student who is employed part-time in one of the approved occupations. These occupational categories and their codes are listed in the Section II in this guide. Students receiving a minimum of 15 hours of training per week may receive 3 units of credit, while students receiving a minimum of 10 hours of training per week may receive 2 units of credit. All students enrolled in the same class period must receive the same number of credits.

Training sponsors agree to provide a minimum of 10 of the training hours during the school week, to pay a fair and equitable wage consistent with the student's ability and economic conditions, and to regularly monitor and review the student's progress on the job.

Training Plans

The training sponsor assists the teacher-coordinator in developing a plan for systematically relating on-the-job experiences to classroom instruction. Each training plan will include competency statements related to essential elements for the occupational specialty, as well as additional competencies identified as helpful by the training sponsor. Individualized instruction will be developed to support mastery of the specialized competencies.

The occupational category code number used on the training plan agreement is also used on the PEIMS Report. Training plans are signed by the student, the parent/guardian, the training sponsor, and the teacher-coordinator, and a copy is placed on file with the appropriate campus administrator within three weeks of the time the students begins employment. Copies of the training plan are also provided to the student, the training sponsor, and one is retained by the teacher.

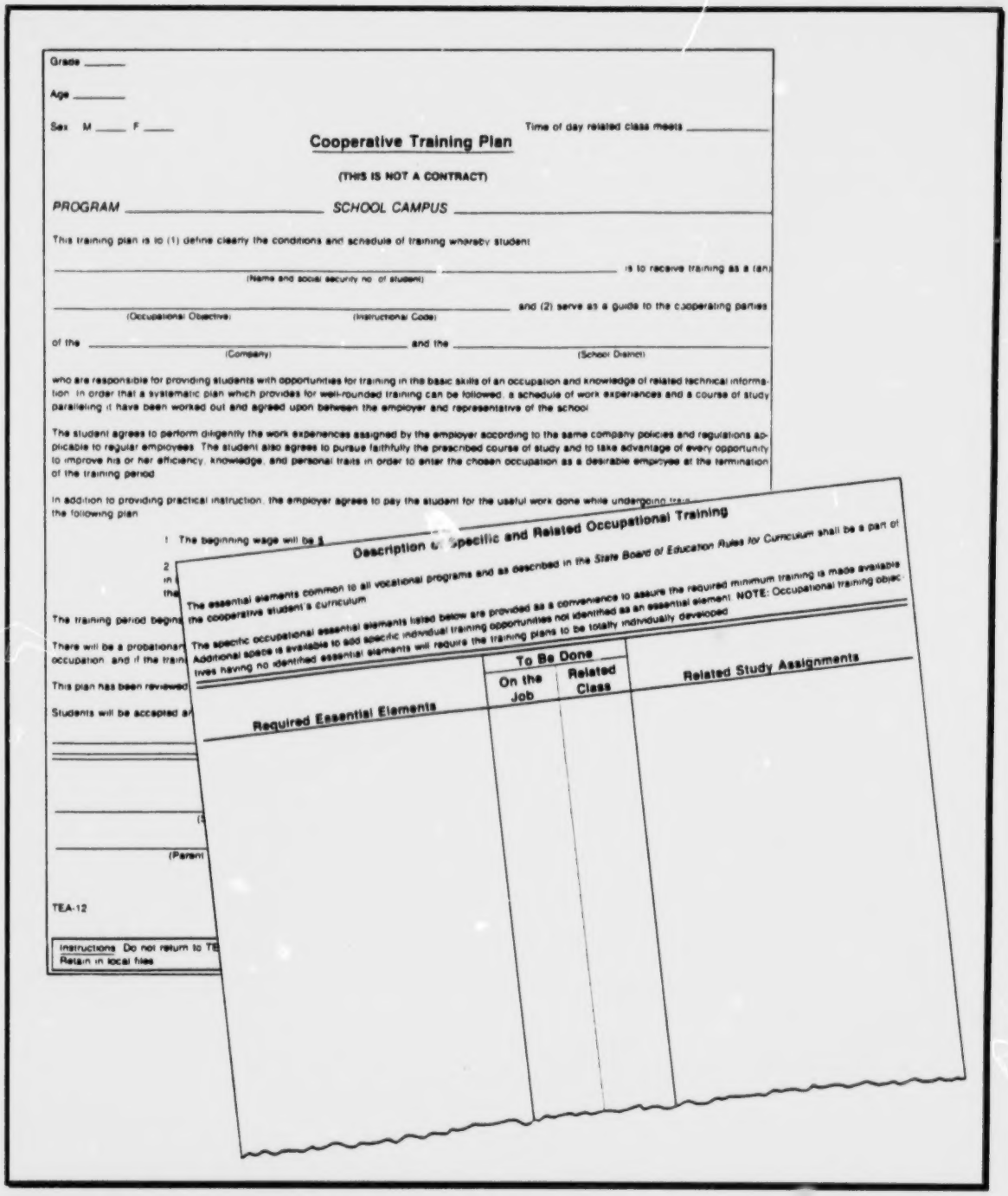
The training plan is the document used to plan and implement occupationally specific instruction and experience. It is also used as a record of the student's progress, both on the job and in the classroom. Figure 1 shows a sample training plan.

Sample competency record/training plans for the occupations of salesperson, checker/cashier, and stockkeeper/stock clerk have been developed for a variety of occupational categories and are included in Appendix B. Blank lines have been provided for listing additional occupationally specific competencies. The teacher-coordinator should develop a code system for identifying which competencies will be addressed specifically on the job. These competencies might be highlighted, starred, or underlined for easy reference. Six grading period blocks are provided, and a competency rating system is suggested for indicating the student's progress throughout the year. In Section II, concepts and strategies for evaluating progress are discussed. Sample employer evaluation forms are included in Appendix B.

Competency Profiles

Mastery of the essential elements and related occupationally specific competencies must be documented for each student enrolled in a cooperative education or laboratory course.

Students enrolled in cluster courses must also have documentation showing mastery of course essential elements.



Grade _____

Age _____

Sex M ____ F ____ Time of day related class meets _____

Cooperative Training Plan

(THIS IS NOT A CONTRACT)

PROGRAM _____ *SCHOOL CAMPUS* _____

This training plan is to (1) define clearly the conditions and schedule of training whereby student

_____ (Name and social security no. of student) is to receive training as a (an)

_____ (Occupational Objective) (Instructional Code) and (2) serve as a guide to the cooperating parties

of the _____ (Company) and the _____ (School District)

who are responsible for providing students with opportunities for training in the basic skills of an occupation and knowledge of related technical information. In order that a systematic plan which provides for well-rounded training can be followed, a schedule of work experiences and a course of study paralleling it have been worked out and agreed upon between the employer and representative of the school.

The student agrees to perform diligently the work experiences assigned by the employer according to the same company policies and regulations applicable to regular employees. The student also agrees to pursue faithfully the prescribed course of study and to take advantage of every opportunity to improve his or her efficiency, knowledge, and personal traits in order to enter the chosen occupation as a desirable employee at the termination of the training period.

In addition to providing practical instruction, the employer agrees to pay the student for the useful work done while undergoing train
the following plan:

1. The beginning wage will be $

2
in
the

The training period begins

There will be a probationary
occupation, and if the train

This plan has been reviewed

Students will be accepted a

(Parent

TEA-12

Instructions: Do not return to TE
Retain in local files

Description of Specific and Related Occupational Training

The essential elements common to all vocational programs and as described in the *State Board of Education Rules for Curriculum* shall be a part of the cooperative student's curriculum.

The specific occupational essential elements listed below are provided as a convenience to assure the required minimum training is made available. Additional space is available to add specific individual training opportunities not identified as an essential element. NOTE: Occupational training objectives having no identified essential elements will require the training plans to be totally individually developed.

Required Essential Elements	To Be Done		Related Study Assignments
	On the Job	Related Class	

Fig. 1. An example of a training plan (VOC 044 R). Documents similar to this one are used in planning, to clarify the responsibilities of the training sponsor and the teacher-coordinator. They can also be used to record each student's degree of mastery of tasks and information. For more information on this and other documentation, see "The Total Student Record," in Section II, which also includes blank forms for use.

A wide variety of competency profile formats are available commercially. The combination competency record/training plans presented as samples in Section II and Appendix B of this guide provide one central location for documentation of mastery.

Coordination Techniques

The nature of occupationally specific instruction helps to define the role of a Marketing Education instructor. In order to provide a quality program of marketing curriculum instruction related to specific occupational experiences, the instructor performs the duties of teacher and coordinator of instruction, thus the title *teacher-coordinator*. Instruction is focused on the student as a total person as he/she moves toward a stated career objective. Coordination involves interacting with any and all individuals who interface with the student and the stated career objective.

Typical individuals with whom the ME instructor might coordinate include training sponsor, guidance counselor, campus discipline administrator, general education teachers, parents, coaches, extracurricular sponsors, college/military recruiters, and potential future employers, to name a few. The following basic examples illustrate ways to relate the student's career objective to marketing instruction by coordinating each with his/her daily experiences. Please see Appendix B for a more detailed list of coordination techniques for use with training sponsors and for a form to use in reporting coordination visits. Also, please note that assisting a student in preparation for DECA competitive events provides numerous opportunities to relate and coordinate instruction with career preparation experiences.

The following list tells what the ME teacher-coordinator might do with specific persons to maximize the impact of specific individuals on student progress and program effectiveness.

Training Sponsor: Arrange for student to conduct a field trip of training station for classmates. Photograph student trainee with training sponsor and class for display at school and/or for use at employer appreciation event. During the school year, the teacher-coordinator must visit each training station at least six times with at least one visit per grading period. Please see State Rules and Regulations (Appendix A) for a more detailed list of coordination techniques for use with training sponsors.

Guidance Counselor: Ask counselor to involve ME students as presenters to freshmen and sophomore classes prior to schedule request deadline. Students could conduct role-play demonstrations of typical ME learning opportunities, both at school and on the job.

Campus Discipline Administrator: Cooperate to develop a clear set of guidelines for school disciplinary actions as they relate to scheduled worktime during the school day. Invite the administrator (and possibly an advisory council member) to make a class presentation and lead discussion about the importance of personal responsibility in the workplace and at school.

General Education Teacher: Invite an English teacher to observe sales demonstrations that have been developed using a current literature assignment character as the customer. Students should have selected a character whose needs might be met in their training station, analyzed the character's buying personality in view of the literature selection, and prepared (with the help of a classmate) a role-play demonstrating a successful sale.

Parent: Conduct an informal back-to-school open house inviting parents and training sponsors to tour classroom facilities and observe a student-presented preview of the year's activities. Serve refreshments, take photographs, sign training plans, and generally get acquainted.

Coach: Early in the year, make contact to see if and when competition and leadership training opportunities overlap. Help student to prioritize time in order to remain eligible for all activities.

Extracurricular Sponsor: Invite students preparing for public speaking contests (especially contests related to free enterprise) to practice before ME classes.

Recruiter: Invite recruiters for military and/or colleges to be guest speakers in class. Student(s) with the most directly related career objectives should serve as hosts and introduce the guest to the class.

Potential Employer: Provide students with employment leads as network enables. Prepare written references as requested.

Advisory Councils

A districtwide local advisory council will include community representatives for each vocational program, as well a parent and at least one member representing special populations of students. It is helpful for each Marketing Education program to form a separate specialized advisory council. The guidelines for districtwide advisory councils are appropriate for program advisory councils and are as follows:

Purpose:
To provide communication between school and community
To advise school of current job needs
To assist in reviewing curriculum for relevancy

Membership:
Five to seven individuals
Balanced representation of sexes, races, and ethnic minorities as found in the community
Balanced representation of business, industry, general citizenship of the community

Meetings:
Minimum of two meetings per year
Minutes of meetings should be kept on file.

Activities:
Enlist new training stations.
Contribute laboratory equipment.
Sponsor student participation in competitive event trips.
Serve as judges for competitive events.
Arrange for field trips.
Invite guest presenters from their specialized industry.
Supply current trade journals.
Review student projects for relevant applications.
Provide demonstration site for project development.

Specialized Wage Regulations

It is generally understood that students who are employed through the cooperation of school and community will receive the training and supervision needed to develop productive work habits. These student trainees will contribute to the successful operation of their training stations and should be paid according to the same scale used for nonschool personnel filling the same jobs, typically minimum wage or higher.

In selected cases, students may qualify for governmental agency wage benefit programs. Descriptions of these programs follow.

Job Training Partnership Act

This program is available to students from economically disadvantaged households in an effort to provide educational and employment training. Grant funding is variable since federal funding allotments change. Students must document eligibility through the JTPA coordinator, who completes the application process. If approved, the student is eligible for 200 hours of employment at minimum wage in a for-profit business or 500 hours in a nonprofit business.

At the completion of the 200- or 500-hour program, the current employer pays the student minimum wage or more while the student is enrolled in Marketing Education. For more information, contact your local Council of Governments representative.

Targeted Jobs Tax Credit

This program is available to employers who hire targeted groups who tend to have a high unemployment rate or other special needs. The student-employee must be certified as economically disadvantaged and/or handicapped. The advantage to the employer (many chain organizations are already prescreening student-applicants because they know this) is that the employer receives a tax credit of 50% of the student's wages for the first year and 25% of his/her second year's wages.

The student who qualifies under the provision of being handicapped would be served by the Special Education Department. The following guidelines are for assisting the employer in hiring an economically disadvantaged student enrolled in Marketing Education.

1. Prior to the first day on the job, the employer requests that the ME teacher begin the certification process with the student. (Some major corporations have the student use an 800 number to call their accounting office to initiate the certification process.)
2. The Family Income Questionnaire (FIQ) is completed by the student's parent and returned to the ME teacher.
3. The teacher attaches the Request for Certification form (Appendix B) to the FIQ and mails them to the Texas Employment Commission for verification of eligibility for the credit. **(See form titled "Request for Certification.")**
4. When the teacher receives verification from TEC, the Form 6199 is completed and forwarded to the employer for signatures.

For more information, contact:

Texas Employment Commission
Special Programs Department
TJTC Unit
TEC Building
Austin, TX 78778

Subminimum wages

There are a number of guidelines for employers and the Marketing Education teacher to follow when the employer decides to pay the student less than the current minimum wage. The application must be mailed and postmarked prior to the first day of employment. For applications, contact:

U.S. Department of Labor
Employment Standard Administration
Wage and Hour Division
555 Griffin Square Bldg., Room 506
Dallas, TX 75202

Substitute Teacher Outline

Scheduled Need

Substitute teachers will need to be scheduled in advance for special events such as DECA conferences, individual class field trips, or professional development opportunities that take the ME teacher-coordinator away from any regular classes.

Emergency Need

Personal or family emergencies may create unexpected needs to call for a substitute.

Student Preparation for Substitute

During first-week orientation, students should be acquainted with the designated procedure to follow when a substitute teacher appears in the class. Simple guidelines may be written and posted in the room to avoid confusion and disappointments. Specialized tasks that may and should be performed by students should be spelled out, along with specific behaviors that are not allowed. One overriding premise should be made clear: every minute of classtime represents a valuable learning opportunity, no matter who is checking the role and making the assignment. A visiting manager at the training station would be shown great courtesy and respect, and the same practice is appropriate for class.

Written Guidelines for the Substitute Teacher

Whether the absence is prescheduled or an emergency, the substitute will need detailed written guidelines in order to keep the classes on task. It is a good idea to keep an *emergency packet* prepared for those occassions when there is not enough time to write quality detailed plans for the regularly scheduled lessons. In either case, the substitute will need information, in the following categories: (1) administrative details, (2) personnel information, (3) lesson plan and materials, and (4) inside or background information. Please see the two-page **"Substitute Teacher Guidelines"** form which follows. Listed below are some basic ideas for "Substitute Day Procedures" and emergency packets. Local district guidelines and individual program designs will determine the degree to which these ideas are useful or need to be supplemented.

Student Operating Procedure with Substitute Teacher

All regular classroom procedures apply:

Be prompt.
Be prepared.
Be polite.
Be positive.
Be productive.

Follow the regular pattern for whatever assignment is made:

Take notes.
Take a test.
Script a video.
Prepare an individual assignment.

Follow the regular pattern for processing finished work:

Turn in to basket.
File in your folder.
Keep until later.

Avoid unpleasant consequences; do not suggest inappropriate uses of time to confuse substitute. Unacceptable activities include:

Eating in class
Chewing gum
Sleeping
Conducting personal business during classtime
Leaving the room to socialize or avoid working
Doing anything else you would not do on a regular day

Emergency Packet Assignments

Watch and script a selected video for later use when writing a paper or leading a discussion.
Read and take notes on articles from selected back issues of *DECA Dimensions*.
Read and complete periodical reports over articles from *Wall Street Journal* or trade journals.
Use classtime to prepare individualized assignments listed on training plan.

Substitute Teacher Guidelines for _____ 19___

Marketing Education - Room _____

_____ HIGH SCHOOL

Administrative Details

Class schedule with *bell times* plus *special occasion bell schedule* attached/highlighted.

Special duty assignment: _____

Report attendance to office: _____

_____

Report attendance in grade book: _____

_____

Procedure for closing the room: _____

_____

In case of fire drill: _____

_____

Personnel Information

Class rolls and/or seating charts are attached. _____

Student responsibilities by class period: answer telephone, school store, distribute/collect materials

____ _____

____ _____

____ _____

____ _____

____ _____

Teacher/Room no. for assistance: _____

Miscellaneous Helpful Information

Tardies procedure: _____

Hall pass procedure: _____

Friendly reminders for students: _____

Students needing special seating arrangements: _____

Thanks: _____

Lesson Plan for_____ **meeting** _____ **period, on** _____

CALL ATTENTION TO POSTED PROCEDURES FOR SUBSTITUTE DAY

Chalkboard instructions: _____

_____

_____

_____

Handout materials are located: _____

Instructions for handout materials: _____

_____

Materials to be collected: _____

Materials collected should be placed: _____

_____

Special AV instructions: _____

_____

Time frame for activities: _____

_____

Acceptable student behavior includes: _____

_____

_____

Closing message to students: _____

_____

_____

Substitute observations: _____

_____

_____

Section II: Instructional Responsibilities
of the Marketing Education Teacher-Coordinator

Course Descriptions and Codes
Historical Rationale for Content
The Total Student Record (Includes Appropriate Forms)
Course Management System
Addressing Special Needs

Course Descriptions and Codes

Marketing Education I 11654100 **Grades 11-12, 2-3 credits (age 16)**

This course is an occupational orientation to the world of marketing and the American free enterprise system through a combination of classroom instruction, laboratory, and directed on-the-job training experiences. (Additional codes, listed below, will indicate the occupationally specific area of each student's training plan.)

Marketing Education II 11654200 **Grades 11-12, 2-3 credits (age 16)**

This course takes a management approach to the world of marketing. Concepts and skills are addressed through a combination of classroom instruction, laboratory, and directed on-the-job training experiences. (Additional codes, listed below, will indicate the occupationally specific area of each student's training plan.)

Entrepreneurship 11650850 **Grades 11-12, 1-3 credits (age 16)**

This course provides entrepreneurial training to students interested in eventually owning or managing a business. Instruction takes place solely through classroom or through a combination of classroom and on-the-job training experiences.

Principles of Marketing 11653100 **Grades 10-12, 1/2 credit**

This cluster course is offered in one semester and focuses on the functional, product, and institutional approaches to marketing.

Retail Merchandising 11653200 **Grades 10-12, 1/2 credit**

This cluster course focuses on the retail phase of marketing and places special emphasis on retailing, economics and marketing, merchandising, selling, promotion, and store operations.

Occupationally Specific Categories and Codes

11650102 Hotel-motel management
11650103 Insurance
11650109 Fashion merchandising
11650110 Footwear marketing
11650111 Jewelry marketing
11650112 Convenience store marketing
11650114 Appliance marketing
11650115 Building materials marketing
11650118 Travel services marketing
11650117 Furniture marketing

11650120 Automotive and accessories marketing
11650122 Service station retailing
11650600 Financial services marketing
11650650 Advertising and display services
11650700 Floristry, farm and garden supplies
11650750 Apparel and accessories marketing
11650800 Food marketing
11650850 Entrepreneurship
11650900 Home and office products marketing
11651000 Industrial marketing
11651200 Hardware marketing
11651400 Wholesaling and warehouse services marketing
11651500 Business and personal services marketing
11651600 Recreation and tourism marketing

11651700 General merchandising
11652300 Food service marketing
11659999 Marketing education, other

Historical Rationale for Content

Essential Elements

The Texas Legislature, acting through the State Board of Education (SBOE), sets policies, guidelines and standards that apply to all school districts to be administered by the Texas Education Agency (TEA). In 1984, the Legislature enacted H.B. 72, which instituted certain educational reforms that affect the operation of Marketing Education programs. In addition, the SBOE acted upon previous legislation and issued new curriculum standards and guidelines, which are contained in a document entitled *SBOE Rules for Curriculum*, listing the essential elements for each course to be taught in Texas. EIMC-Educational Resources at the University of Texas in Austin publishes curriculum guides for each course, which include recommendations for scope and sequence based on essential elements.

Essential elements are broad statements that summarize a cluster of competency descriptors. Their intent is to prescribe the **minimum** standards of curriculum that shall be offered to all students enrolled in a particular course at a particular grade level, regardless of which school they are enrolled in within the state. As an attempt to give uniformity to school curricula, essential elements are a guarantee that each program shall meet these minimal standards. To ensure implementation and continued use of essential elements, the SBOE has directed TEA to conduct monitoring visits to each program in the state at least **once every three years.**

National Curriculum Framework

The National Council for Marketing Education determined that a need existed "to establish procedures to assure that marketing education program graduates have consistent and necessary levels of occupational competence regardless of the school or state in which instruction is taken." In 1984, in Atlanta, the National Curriculum Conference involved more than 300 teachers and administrators of Marketing Education programs in an effort to develop a national curriculum guide and set of program standards. These documents were intended to provide assistance to state and local Marketing Education programs when reviewing and planning their curricula.

In their 1987 report, the members of the Curriculum Committee identified five levels of marketing occupations into which positions can be classified: entry-level, career-sustaining, marketing specialist, marketing supervisor, and manager/entrepreneur. Then the committee identified three foundations of core competencies which are important to successful performance in marketing occupations: economic, human resources, and marketing and business. Although these competencies are not specifically related to marketing occupations, the committee recognized that they should be mastered before the ones directly related to marketing. Then the committee identified nine functional areas that are practical and job-related for the Marketing Education curriculum: distribution, financing, marketing-information management, pricing, product/service planning, promotion, purchasing, risk management, and selling. The levels of marketing occupations, the foundational competencies, and the functions of marketing competencies make up the National Curriculum Framework.

Combination

A Texas school district may add elements of instruction at its discretion, but shall not delete or omit instruction in the essential elements required by the SBOE (TAC 75.4). To facilitate instructional planning, the combination "Competency Profile/Training Plan" documents included in this *Program Management Guide* arrange the mandated essential elements for Marketing Education courses into the format of the National Curriculum Framework. Also, occupationally specific elements (competency statements) have been included for ME I and ME II documents by the same name.

ME teacher-coordinators are mandated to maintain competency profiles for all students and training plans for all students in occupationally specific courses; however, there is no mandated format for doing so. In the pages which follow, a total system is introduced for maintaining student competency, training, and follow-up data. The system is designed to facilitate instructional planning and record keeping while meeting all requirements for vocational compliance monitoring of instruction. The competencies have been referenced to state-adopted textbooks; instructional materials from EIMC-Educational Resources, the University of Texas at Austin; MarkED LAPs; and other miscellaneous resources. Space is provided for individual teacher adaptations.

The Total Student Record

The Total Student Record has four parts: (1) Student Personal Data, (2) Cooperative Training Plan Agreement, (3) Training Plan Competencies and Assignments, and (4) Competency Record. A discussion of the design and function of each part follows, along with procedures for collecting information, planning instruction, and recording results. Figure 1 will help in clarifying what is included. Because they are used together, the appropriate forms are at the end of this chapter rather than in Appendix B.

More specifically, this is what a student record can include, with options noted:

1. A completed **Marketing Education Student Record**

2. The front page of the ***Cooperative Training Plan*, Marketing Education**

3. Either an industry and occupationally specific **Competency Record and Training Plan** such as those provided later in this chapter, OR another training plan format such as the back of the traditional training plan that lists tasks done on the job and class assignments, OR one of the training plans developed for Educational Resources/EIMC individualized publications, OR another document accomplishing the same outcome

4. An appropriate Marketing Education competency record of choice, such as the form headed **Marketing Education I—General Marketing, Competency Record and Training Plan.**

Personal Data

Each student should have a summary record, which includes basic personal information, a history of on-the-job training and course mastery level, and one-year follow-up data. This record will be useful when preparing Annual Application Follow-up Reports, writing references, and making coordination contacts. The student's application form, interview, class and O-J-T records, as well as the response to the annual follow-up information request, provide information for completing this form.

Cooperative Training Plan Agreement

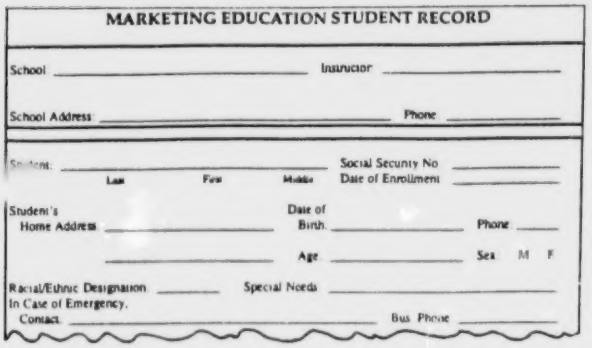
Although not a contract, signatures on the training plan agreement validate the intended cooperation among all parties involved in a student's occupationally specific plan for instruction and training. The agreement describes the parties involved in the training, the occupational objective, and with the agreed-upon wage and duration of training. It should be noted that a description of the occupational objective includes the specific occupational (job) title, the occupational category, and its eight-digit code. An example would be Checker/Cashier, Food Marketing 11650800. Information for completing this agreement is found on the student's application, in the occupational categories/codes listed earlier in this guide, and through interviews with training sponsors.

Training Plan Competencies and Assignments

Occupational training objectives having essential elements described in the *SBOE Rules for Curriculum* must include those essential elements on the training plan. The teacher-coordinator, together with the training sponsor or supervisor, will list all of the additional occupational experiences not identified under "Required Essential Elements." Study assignments which relate to

Figure 1. Parts of a Total Student Record

Student personal data


MARKETING EDUCATION STUDENT RECORD

School _____ Instructor _____

School Address _____ Phone _____

Student: _____ Social Security No _____
Last First Middle Date of Enrollment _____

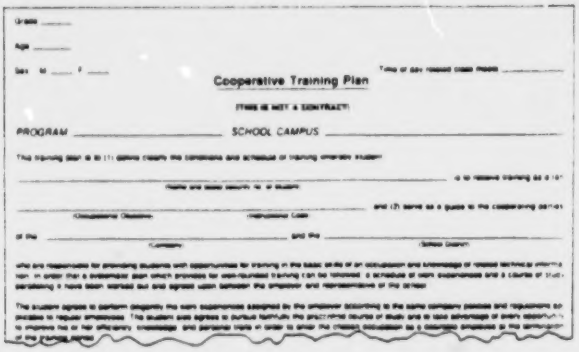
Student's Home Address _____ Date of Birth _____ Phone _____

_____ Age _____ Sex M F

Racial/Ethnic Designation _____ Special Needs _____

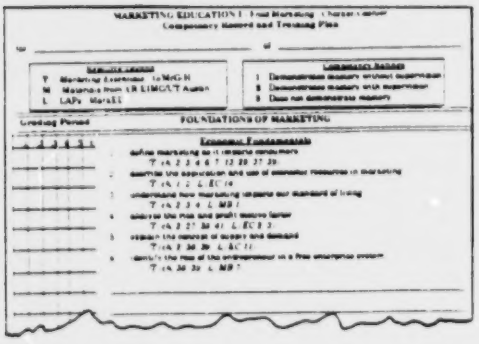
In Case of Emergency, Contact _____ Bus. Phone _____

Cooperative training plan agreement


Cooperative Training Plan

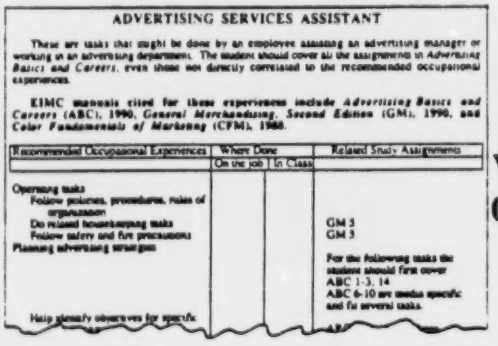
PROGRAM _____ SCHOOL CAMPUS _____

Training Plan Competencies and Assignments


MARKETING EDUCATION I

FOUNDATIONS OF MARKETING

OR


ADVERTISING SERVICES ASSISTANT

These are tasks that might be done by an employee assisting an advertising manager or working in an advertising department. The student should cover all the assignments in *Advertising Basics and Careers*, even those not directly correlated to the recommended occupational experiences.

EIMC manuals cited for these experiences include *Advertising Basics and Careers* (ABC), 1990, *General Merchandising, Second Edition* (GM), 1990, and *Color Fundamentals of Marketing* (CFM), 1986.

Recommended Occupational Experiences	Where Done		Related Study Assignments
	On the job	In Class	
Operating tasks			
Follow policies, procedures, rules of organization			
Do related housekeeping tasks			GM 3
Follow safety and fire precautions			GM 3
Planning advertising strategies			
			For the following tasks the student should first cover ABC 1-3, 14
			ABC 6-10 are tasks specific and fit several tasks.
Help classify objectives for specific			

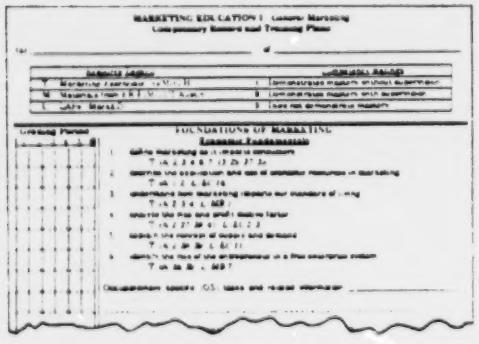
OR

OR

VOC

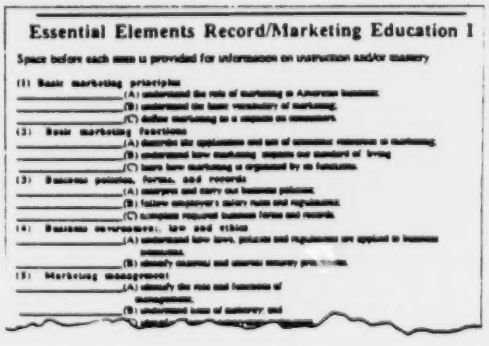
044R

Competency Record


MARKETING EDUCATION I

FOUNDATIONS OF MARKETING

OR


Essential Elements Record/Marketing Education I

Space before each area is provided for information on instruction and/or mastery.

(1) Basic marketing principles

(2) Basic marketing functions

(3) Business policies, forms, and records

(4) Business ownerships, law and ethics

(5) Marketing management

and support mastery of the elements (competencies) should be listed. It is appropriate to indicate which competencies will be developed in the classroom, on-the-job, or in both areas. The student's progress in developing mastery of the occupationally specific competencies must be documented.

Competency Record

A student enrolled in any ME course must have a record indicating his/her mastery of the essential elements for the course and occupational competencies if appropriate for the course. Although there is no standard format, it is generally accepted that sequence and degree/level of mastery should be indicated. When complete, the competency record should be an accurate reflection of what the student knows and can do with regard to the designated marketing occupation or family of occupations.

ME I—General Marketing Competency Record and Training Plan

When the CR/TP is attached to the student personal data sheet (Marketing Education Student Record) and the training plan agreement (front page of the Cooperative Training Plan, Marketing Education), a Total Student Record is ready to be compiled. The CR/TP lists all core and common essential elements as competency statements organized within the National Curriculum Framework headings. These competencies are numbered sequentially for easy reference and are accompanied by related assignments. In Appendix B are included a variety of CR/TPs for the job titles checker/cashier, salesperson, and stockkeeper/stock clerk in occupational categories where these job titles are appropriate. These specialized CR/TPs include occupationally specific competencies and related study assignments. Additional occupationally specific competencies may be added in the blanks provided under each framework heading. Additional features of the CR/TP are the record-keeping block and suggested competency rating system.

Instructional Planning

Because it correlates essential elements to the National Framework, the basic CR/TP for ME I—General Marketing can be helpful to the teacher in planning or documenting instruction. Educational Resources/EIMC curriculum guides provide a recommended scope and sequence for each ME course, as well as various documents to assist in planning/presenting instruction. Scope and sequence recommendations are based on state-adopted textbook chapters and materials from Educational Resources. To these the CR/TP adds possible alternatives, citing MarkED LAPs in addition to the other materials for each essential element. The element statements on the CR/TP are not numbered the same as essential elements, and are not always worded identically (see fig. 2). Grading period blocks may be used to indicate the competencies which will be addressed in each grading period. In the CR/TP, many competencies are referenced to several chapters in the state-adopted text, so a gradual building of competency is indicated. Many text chapters develop concepts related to several competencies. By using a system of color-coding and dates, a schematic design may be developed to demonstrate how presentation of competencies will progress and overlap.

Documentation of Mastery

Each student should retain a copy of his/her specialized CR/TP and should record his/her own level of mastery in appropriate grading period blocks as classroom and O-J-T evaluation takes place. The teacher-coordinator will record the same information in the student's permanent file copy of the CR/TP.

EIMC-Educational Resources Materials for Record

The newest publications in the individualized materials for co-op use have answer books/teacher guides which include forms for developing training plans, as well as other useful information. Older manuals have only answer books, but they cover most other placements. Acronyms from the titles of the publications can be useful in any kind of training plan format the teacher selects. Here are examples from the twelve new manuals:

ABC—*Advertising Basics and Careers*
AM—*Apparel Marketing*
BVM—*Basic Visual Merchandising*
FSM—*Food Service Marketing, 2nd edition*
GM—*General Merchandising, 2nd edition*
HI—*Home Improvement Center Retailing*
MFF—*Marketing Fibers and Fabrics*
PD—*Physical Distribution*
SCS—*Supermarket Customer Service*
SM—*Supermarket Merchandising*
SSD—*Supermarket Special Departments*
THM—*Tourism and Hospitality Marketing*

A few of the many other potentially useful publications are these:

BRC—*Basic Retail Credit*
CSO—*Convenience Store Operations*
FSM—*Financial Services Marketing*
HMO—*Hotel/Motel Operations*
MFM—*Men's Fashion Merchandising*
RTM—*Retail Travel Marketing*
WFM—*Women's Fashion Merchandising*

Forms for the Total Student Record

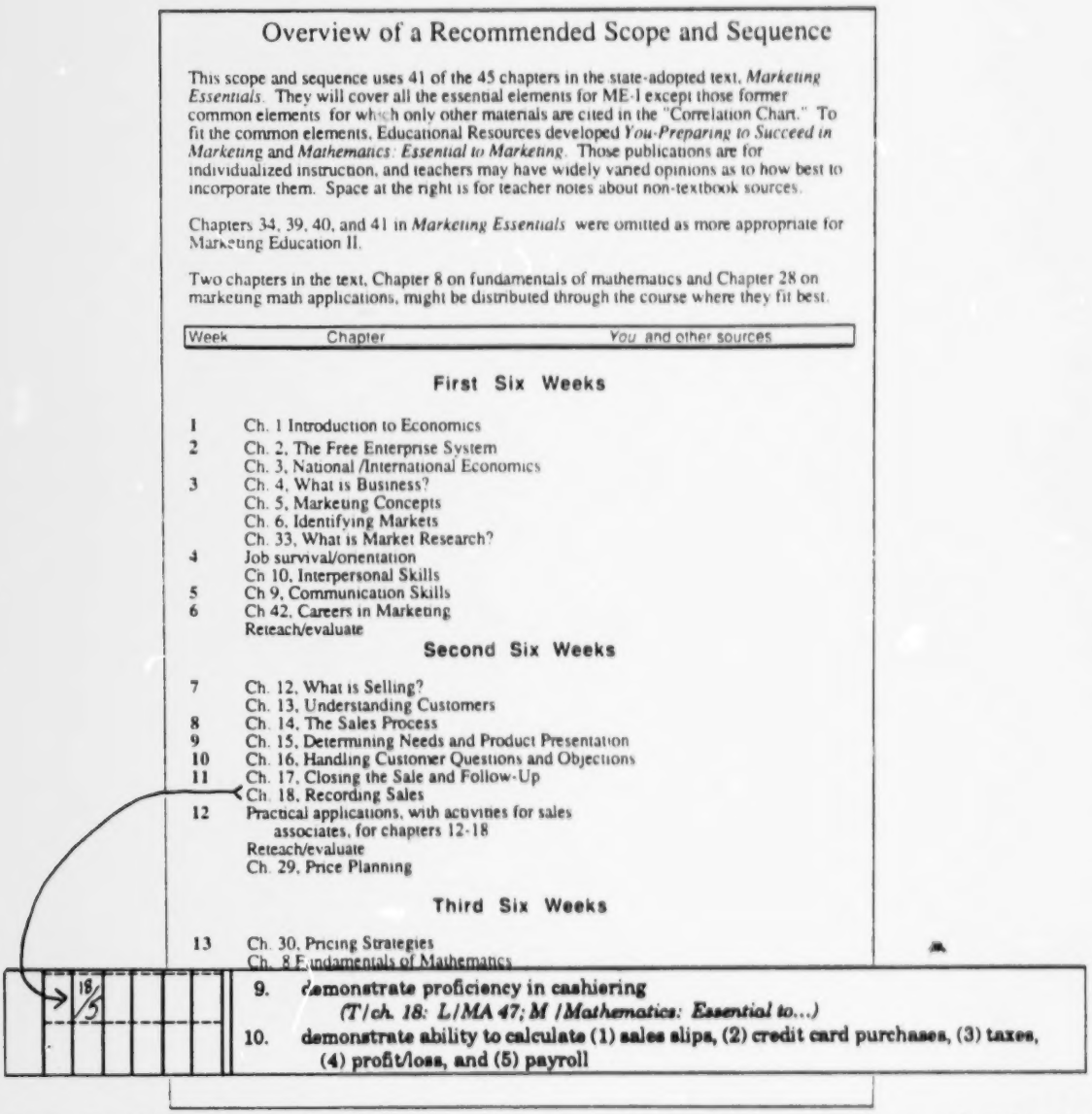
Teachers may copy the following forms for their own use in developing total student records. The alternate forms for training plans and competency records are in the *Curriculum Guide for Marketing Education I*, and the answer book/teacher's guide publications available from EIMC-Educational Resources. Forms provided here include these:

1. For student personal data:
   Marketing Education Student Record

2. For cooperative training plan agreement:
   Cooperative Training Plan—Marketing Education

3. For training plan competencies and assignments:
   Two-column back page from traditional training plan (Answer books/teacher's guides from EIMC-Educational Resources are based on this form)
   CR/TP for Apparel and Accessories: Salesperson
   CR/TP for Automotive and Accessories: Stocker
   CR/TP for Food Marketing: Checker/Cashier
   CR/TP for Food Marketing: Stocker
   CR/TP for General Merchandising: Checker/Cashier
   CR/TP for General Merchandising: Stocker
   CR/TP for Business and Personal Services: Salesperson

4. For a competency record:
   CR/TP for Marketing Education I—General Marketing
   CR/TP for Marketing Education II—General Marketing
   Competency Record for Principles of Marketing
   Competency Record for Retail Merchandising



Overview of a Recommended Scope and Sequence

This scope and sequence uses 41 of the 45 chapters in the state-adopted text, *Marketing Essentials*. They will cover all the essential elements for ME-I except those former common elements for which only other materials are cited in the "Correlation Chart." To fit the common elements, Educational Resources developed *You-Preparing to Succeed in Marketing* and *Mathematics: Essential to Marketing*. Those publications are for individualized instruction, and teachers may have widely varied opinions as to how best to incorporate them. Space at the right is for teacher notes about non-textbook sources.

Chapters 34, 39, 40, and 41 in *Marketing Essentials* were omitted as more appropriate for Marketing Education II.

Two chapters in the text, Chapter 8 on fundamentals of mathematics and Chapter 28 on marketing math applications, might be distributed through the course where they fit best.

Week	Chapter	You and other sources
	First Six Weeks	
1	Ch. 1 Introduction to Economics	
2	Ch. 2, The Free Enterprise System	
	Ch. 3, National /International Economics	
3	Ch. 4, What is Business?	
	Ch. 5, Marketing Concepts	
	Ch. 6, Identifying Markets	
	Ch. 33, What is Market Research?	
4	Job survival/orientation	
	Ch 10, Interpersonal Skills	
5	Ch 9, Communication Skills	
6	Ch 42, Careers in Marketing	
	Reteach/evaluate	
	Second Six Weeks	
7	Ch. 12, What is Selling?	
	Ch. 13, Understanding Customers	
8	Ch. 14, The Sales Process	
9	Ch. 15, Determining Needs and Product Presentation	
10	Ch. 16, Handling Customer Questions and Objections	
11	Ch. 17, Closing the Sale and Follow-Up	
	Ch. 18, Recording Sales	
12	Practical applications, with activities for sales associates, for chapters 12-18	
	Reteach/evaluate	
	Ch. 29, Price Planning	
	Third Six Weeks	
13	Ch. 30, Pricing Strategies	
	Ch. 8 Fundamentals of Mathematics	

18/5	9. demonstrate proficiency in cashiering *(T/ch. 18: L/MA 47; M /Mathematics: Essential to...)* 10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll

Fig. 2. The ME I CR/TP correlates Texas essential elements to the National Curriculum Framework, and can be used with the suggested scope and sequence from Educational Resource/EIMC. For this example, the "Overview of a Recommended Scope and Sequence" showed that "Chapter 18, Recording Sales," would fit well in the fifth week of the second grading period, as part of a series of selling-related chapters. The teacher wrote 18/5 in the correct box. Line 9 on the CR/TP form showed that this same element can be addressed with a MarkED LAP as well as Educational Resources' Mathematics: Essential to Marketing.

MARKETING EDUCATION STUDENT RECORD

School: _____ Instructor: _____

School Address: _____ Phone: _____

Student: _____ Social Security No.: _____
Last First Middle Date of Enrollment: _____

Student's Home Address: _____ Date of Birth: _____ Phone: _____

_____ Age: _____ Sex: M F

Racial/Ethnic Designation: _____ Special Needs: _____

In Case of Emergency,
Contact: _____ Bus. Phone: _____

Address: _____ Home Phone: _____

OR: _____ Bus. Phone: _____

Address: _____ Home Phone: _____

Family Doctor: _____ Phone: _____

Insurance Company: _____ Policy No.: _____

Special Medical Needs: _____

PRIOR WORK EXPERIENCE & MARKETING COOPERATIVE EDUCATION TRAINING

Dates of Employment	Job Title	Employer	Supervisor	Address of Employer	Phone

SUMMARY OF COMPETENCE

Course: _____ Date of Completion: _____

Total Hours Absent: _____

Total Times Tardy: _____

Total Class Hours: _____ Total On-the-Job Training: _____

Grade _____

Age _____

Sex: M _____ F _____

Time of day related class meets _____

Cooperative Training Plan

(THIS IS NOT A CONTRACT)

PROGRAM _____ *SCHOOL CAMPUS* _____

This training plan is to (1) define clearly the conditions and schedule of training whereby student

_____ is to receive training as a (an)
(Name and social security no. of student)

_____ and (2) serve as a guide to the cooperating parties:
(Occupational Objective) (Instructional Code)

of the _____ and the _____
(Company) (School District)

who are responsible for providing students with opportunities for training in the basic skills of an occupation and knowledge of related technical information. In order that a systematic plan which provides for well-rounded training can be followed, a schedule of work experiences and a course of study paralleling it have been worked out and agreed upon between the employer and representative of the school.

The student agrees to perform diligently the work experiences assigned by the employer according to the same company policies and regulations applicable to regular employees. The student also agrees to pursue faithfully the prescribed course of study and to take advantage of every opportunity to improve his or her efficiency, knowledge, and personal traits in order to enter the chosen occupation as a desirable employee at the termination of the training period.

In addition to providing practical instruction, the employer agrees to pay the student for the useful work done while undergoing training according to the following plan:

1. The beginning wage will be $ _____ per _____ for _____ hours per school week.

2. A review of the wages paid the student will be made jointly by the employer and coordinator periodically in keeping with company policy for the purpose of determining a fair and equitable wage consistent with the student's increased ability and prevailing economic conditions.

The training period begins the _____ day of _____, 19 _____, and extends through _____, 19 _____

There will be a probationary period of _____ days during which the interested parties may determine if the student has made a wise choice of an occupation, and if the training should be continued.

This plan has been reviewed and recommended by the Local Advisory Committee. It may be terminated for just cause by either party without recourse.

Students will be accepted and assigned to jobs without regard to race, color, national origin, sex, or handicapping condition.

SIGNATURE APPROVALS:

_____ (Student)

_____ (Employer)

_____ (Parent or Guardian)

_____ (Teacher-Coordinator)

TEA-12

(Over)

Instructions: Do not return to TEA. Retain in local files.

VOC-044P

Description of Specific and Related Occupational Training

The essential elements common to all vocational programs and as described in the *State Board of Education Rules for Curriculum* shall be a part of the cooperative student's curriculum.

The specific occupational essential elements listed below are provided as a convenience to assure the required minimum training is made available. Additional space is available to add specific individual training opportunities not identified as an essential element. **NOTE:** Occupational training objectives having no identified essential elements will require the training plans to be totally individually developed.

Required Essential Elements	To Be Done		Related Study Assignments
	On the Job	Related Class	

Additional Occupational Experiences	On the Job	Related Class

MARKETING EDUCATION I - Apparel and Accessories: Salesperson
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period

1	2	3	4	5	6

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw])
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Marketing Math [Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47: Cashier/Clerk)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. process cash drawer transactions
   (Cashier Clerk)

OS. facilitate credit applications
   (OJT)

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45)

1	2	3	4	5	6	
						16. demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17. recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18. complete required business forms and records *(T/ch. 18, 28)*
						19. understand lines of authority *(T/ch. 4, 11)*
						20. identify effective supervisory techniques *(T/ch. 10, 11)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						OS. complete housekeeping responsibilities *(M/General Merchandising 5)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25)*
						OS. check and price mark incoming stock, process returned/damaged products *(M/Apparel Marketing)*
						OS. maintain stock levels and complete stock counts *(M/General Merchandising)*
						Finance

BEST COPY AVAILABLE

1	2	3	4	5	6	
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						OS. maintain displays *(M/Apparel Marketing)*
						OS. decorate business/department *(OJT)*
						Purchasing
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27: M/Convenience Store Operations)*
						53. identify external and internal security procedures *(T/ch. 26, 27)*
						Selling
						OS. obtain product information from sources on/with the item and appropriate individuals *(M/Apparel Marketing: OJT)*
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126: Apparel & Accessories [G/McG-H]: M/General Merchandising)*
						OS. address customers properly *(M/General Merchandising)*
						OS. use company promotional materials for selling *(M/Apparel Marketing)*
						OS. handle customer inquiries and difficult customers *(M/General Merchandising)*
						OS. provide support services as needed for delivery, packaging, special orders, gift certificates, and telephone orders *(Apparel and Accessories [G/McG-H]: OJT)*

MARKETING EDUCATION I - Automotive and Accessories: Stocker
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period | **FOUNDATIONS OF MARKETING**

1	2	3	4	5	6

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw]
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Food Marketing [G/McG-H]: Mktg Math [Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. calculate return on investment
   (Marketing Math [Sw])

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45: M/Auto Parts Clerk)

1	2	3	4	5	6		
						16.	demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17.	recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18.	complete required business forms and records *(T/ch. 18, 28)*
						19.	understand lines of authority *(T/ch. 4, 11)*
						20.	identify effective supervisory techniques *(T/ch. 10, 11)*
							Human Resource Foundations: Personality Traits
						21.	understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22.	exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23.	demonstrate dependability and punctuality *(L/HR 5, 10)*
						24.	demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25.	understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26.	recognize the dignity in work *(T/ch. 11)*
							Human Resource Foundations: Self-Development
						27.	understand oneself and others *(T/ch. 10: L/HR 2)*
						28.	accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29.	identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30.	identify effective methods to secure and terminate employment *(T/ch. 45)*
						31.	develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32.	apply required methods and sequences when performing tasks *(L/HR 10)*
						33.	apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*
						S.	explore career possibilities in the auto parts industry *(M/Auto Parts Clerk)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						OS. demonstrate responsible performance of basic duties *(M/Auto Parts Clerk)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						OS. define and use common shipping terms and rates *(Receiving/Shipping/Marking/Stocking Clerk [G/McG-H] ch.3)*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						OS. complete housekeeping responsibilities *(M/Auto Parts Clerk)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						OS. maintain unit inventory control system at training station *(M/Auto Parts Clerk)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25: Marketing Math [Sw] M/Auto Parts Clerk: Receiving/Checking/Marking/Stocking Clerk [G/McG-H] ch. 6, 8, 9)*
						OS. *maintain stock levels and complete stock counts* *(M/Auto Parts Clerk)*
						OS. fill orders from invoices *(Marketing Math [Sw] sec. 2: M/Auto Parts Clerk)*
						OS. research current developments in shipping receiving and marking methods and facilities adapt and apply developments as appropriate for training station *(trade journals: M/Auto Parts Clerk)*

1	2	3	4	5	6	
						Finance
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch's. 7, 18, 26, 42)*
						Pricing
						OS. understand company's price lines and pricing structure *(M/Supermarket Merchandising)*
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						OS. construct displays and signs *(M/Auto Parts Clerk)*
						Purchasing
						OS. order merchandise *(M/Auto Parts Clerk)*
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27: M/Convenience Store Operations: M/Auto Parts Clerk)*
						53. identify and practice external and internal security procedures *(T/ch. 26, 27)*
						Selling
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126: M/Auto Parts Clerk)*
						OS. provide courtesy assistance as needed *(M/Auto Parts Clerk)*
						OS. demonstrate useful understanding of catalogs and tools used in the auto parts industry *(M/Auto Parts Clerk)*

MARKETING EDUCATION I - Food Marketing: Checker/Cashier
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period					
1	2	3	4	5	6

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

_____

_____

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw]
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Food Marketing [G/McG-H] ch. 12: Marketing Math [Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47: M/Supermarket Customer Service)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. operate calculator
   (individual store policy)

OS. process cash drawer transactions
   (M/Smk Cus Svc: L/MA 45, 46, 47, 48, 49: Marketing Math [Sw])

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45)

1	2	3	4	5	6	
						16. demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17. recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18. complete required business forms and records *(T/ch. 18, 28)*
						19. understand lines of authority *(T/ch. 4, 11)*
						20. identify effective supervisory techniques *(T/ch. 10, 11)*
						DS. orient new employees *(M/Convenience Store Operations)*
						Human Resource Foundations: Personality Traits
						21. understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22. exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23. demonstrate dependability and punctuality *(L/HR 5, 10)*
						24. demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25. understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26. recognize the dignity in work *(T/ch. 11)*
						Human Resource Foundations: Self-Development
						27. understand oneself and others *(T/ch. 10: L/HR 2)*
						28. accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29. identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30. identify effective methods to secure and terminate employment *(T/ch. 45)*
						31. develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32. apply required methods and sequences when performing tasks *(L/HR 10)*
						33. apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						OS. complete housekeeping responsibilities *(M/General Merchandising)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25)*
						OS. check and price mark incoming stock *(M/Convenience Store Operations)*
						OS. maintain stock and displays *(M/Conv Store Op: M/General Merchandising)*
						Finance

1	2	3	4	5	6	
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						Purchasing
						OS. Work with vendors *(M/Supermarket Customer Service)*
						OS. Reorder merchandise *(M/Conv Store Op)*
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27)*
						53. identify external and internal security procedures *(T/ch. 26, 27: M/Supermarket Merchandising)*
						OS. practice safety precautions when dealing with equipment, fixtures, and customers *(M/Convenience Store Operations)*
						Selling
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126)*
						OS. address customers properly *(M/Supermarket Customer Service)*
						OS. handle customer inquiries and difficult customers *(M/Cashier Clerk ch. 9)*
						OS. provide courtesy help as needed *(M/Supermarket Customer Service)*
						OS. identify produce *(M/Supermarket Customer Service)*

MARKETING EDUCATION I - Food Marketing: Stocker
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period | **FOUNDATIONS OF MARKETING**

1	2	3	4	5	6

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw])
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Food Marketing [G/McG-H]: Mktg Math ([Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. calculate return on investment
   (Marketing Math [Sw] sec. 6)

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45)

1	2	3	4	5	6	
						16. demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17. recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18. complete required business forms and records *(T/ch. 18, 28)*
						OS. prepare a bill of lading for a shipment of merchandise *(Receiving/Checking/Marking/Stocking Clerk [G/McG-H])*
						19. understand lines of authority *(T/ch. 4, 11)*
						20. identify effective supervisory techniques *(T/ch. 10, 11)*
						Human Resource Foundations: Personality Traits
						21. understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22. exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23. demonstrate dependability and punctuality *(L/HR 5, 10)*
						24. demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25. understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26. recognize the dignity in work *(T/ch. 11)*
						Human Resource Foundations: Self-Development
						27. understand oneself and others *(T/ch. 10: L/HR 2)*
						28. accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29. identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30. identify effective methods to secure and terminate employment *(T/ch. 45)*
						31. develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32. apply required methods and sequences when performing tasks *(L/HR 10)*
						33. apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						OS. demonstrate responsible performance of basic duties *(M/Supermarket Customer Service)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						OS. define and use common shipping terms and rates *(Receiving/Shipping/Marking/Stocking Clerk [G/McG-H])*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						OS. complete housekeeping responsibilities *(M/General Merchandising)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						OS. maintain unit inventory control system at training station *(M/Convenience Store Operations)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25: Marketing Math [Sw]: Food Mktg [G/McG-H])* *Receiving/Checking/Marking/Stocking Clerk [G/McG-H])*
						OS. maintain stock levels and complete stock counts *(Food Marketing [G/McG-H])*
						OS. fill orders from invoices *(Marketing Math [Sw])*
						OS. research current developments in shipping receiving and marking methods and facilities adapt and apply developments as appropriate for training station *(trade journals)*

1	2	3	4	5	6	
						Finance
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						OS. understand company's price lines and pricing structure *(M/Supermarket Merchandising)*
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						OS. construct displays and signs *(M/Supermarket Merchandising)*
						Purchasing
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27: M/Convenience Store Operations)*
						53. identify and practice external and internal security procedures *(T/ch. 26, 27: M/Supermarket Merchandising)*
						OS. notify proper party for claims of damage and shortage in a shipment *(M/Supermarket Merchandising)*
						Selling
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126)*
						OS. provide courtesy assistance as needed *(M/Supermarket Customer Service)*
						OS. demonstrate useful understanding of departments in supermarket *(M/Supermarket Customer Service)*

MARKETING EDUCATION I - General Merchandising: Checker/Cashier
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period **FOUNDATIONS OF MARKETING**

1	2	3	4	5	6

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

_____

_____

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw])
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Marketing Math [Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47: M/Cashier/Clerk)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. operate calculator
   (individual store policy)

OS. process cash drawer transactions
   (Cashier Clerk: L/MA 45, 46, 47, 48, 49: Marketing Math [Sw])

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45)

1	2	3	4	5	6	
						16. demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17. recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18. complete required business forms and records *(T/ch. 18, 28)*
						19. understand lines of authority *(T/ch. 4, 11)*
						20. identify effective supervisory techniques *(T/ch. 10, 11)*
						DS. orient new employees *(M/Convenience Store Operations)*
						Human Resource Foundations: Personality Traits
						21. understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22. exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23. demonstrate dependability and punctuality *(L/HR 5, 10)*
						24. demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25. understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26. recognize the dignity in work *(T/ch. 11)*
						Human Resource Foundations: Self-Development
						27. understand oneself and others *(T/ch. 10: L/HR 2)*
						28. accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29. identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30. identify effective methods to secure and terminate employment *(T/ch. 45)*
						31. develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32. apply required methods and sequences when performing tasks *(L/HR 10)*
						33. apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						DS. complete housekeeping responsibilities *(M/General Merchandising)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25)*
						DS. check and price mark incoming stock *(M/General Merchandising)*
						DS. maintain stock and displays *(M/General Merchandising)*
						Finance

1	2	3	4	5	6	
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						Purchasing
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27)*
						53. identify external and internal security procedures *(T/ch. 26, 27)*
						DS. practice safety precautions when dealing with equipment, fixtures, and customers *(M/Convenience Store Operations)*
						Selling
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126)*
						DS. address customers properly *(M/General Merchandising)*
						DS. Handle customer inquiries and difficult customers *(M/General Merchandising)*

MARKETING EDUCATION I - General Merchandising: Stocker
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period | **FOUNDATIONS OF MARKETING**

1	2	3	4	5	6

1	2	3	4	5	6		
						16.	demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17.	recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18.	complete required business forms and records *(T/ch. 18, 28)*
						19.	understand lines of authority *(T/ch. 4, 11)*
						20.	identify effective supervisory techniques *(T/ch. 10, 11)*

Human Resource Foundations: Personality Traits

						21.	understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22.	exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23.	demonstrate dependability and punctuality *(L/HR 5, 10)*
						24.	demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25.	understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26.	recognize the dignity in work *(T/ch. 11)*

Human Resource Foundations: Self-Development

						27.	understand oneself and others *(T/ch. 10: L/HR 2)*
						28.	accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29.	identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30.	identify effective methods to secure and terminate employment *(T/ch. 45)*
						31.	develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32.	apply required methods and sequences when performing tasks *(L/HR 10)*
						33.	apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*
						)S.	explore career possibilities in general merchandising *(M/General Merchandising)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						OS. demonstrate responsible performance of basic duties *(M/General Merchandising)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						OS. define and use common shipping terms and rates *(Receiving/Shipping/Marking/Stocking Clerk [G/McG-H])*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39: General Merchandising)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42: General Merchandising)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						OS. complete housekeeping responsibilities *(M/General Merchandising)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						OS. maintain unit inventory control system at training station *(M/General Merchandising)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25: Marketing Math [Sw] sec. 5: M/General Merchandising) Receiving/Checking/Marking/Stocking Clerk [G/McG-H])*
						OS. maintain stock levels and complete stock counts *(O-J-T)*
						OS. fill orders from invoices *(Marketing Math [Sw])*
						OS. research current developments in shipping receiving and marking methods and facilities adapt and apply developments as appropriate for training station *(trade journals)*

1	2	3	4	5	6	
						Finance
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						OS. understand company's price lines and pricing structure *(M/Supermarket Merchandising)*
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22: General Merchandising)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4: General Merchandising)*
						OS. construct displays and signs *(M/General Merchandising)*
						Purchasing
						OS. order merchandise *(O-J-T)*
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27: M/Convenience Store Operations)*
						53. identify and practice external and internal security procedures *(T/ch. 26, 27)*
						Selling
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126: M/General Merchandising)*
						OS. provide courtesy assistance as needed *(M/General Merchandising)*
						OS. demonstrate useful understanding of departments of training station *(O-J-T)*

MARKETING EDUCATION I - Business and Personal Services: Salesperson
Competency Record and Training Plan

for: _____ of: _____

Resource Legend	
T	*Marketing Essentials* - G/McG-H
M	Materials from ER-EIMC/UT Austin
L	LAPs - MarkED

Competency Ratings	
1	Demonstrates mastery without supervision
2	Demonstrates mastery with supervision
3	Does not demonstrate mastery

Grading Period

1	2	3	4	5	6

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

Human Resource Foundations: Mathematics

7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32: Marketing Math [Sw])
8. understand and apply markup, markdown, stockturn, and personal loan applications
   (T/ch. 26, 30, 31: Marketing Math [Sw])
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47: Cashier/Clerk)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8, 18, 28, 31, 41: L/MA 48, 49)

OS. process cash drawer transactions
   (Cashier Clerk)

OS. facilitate credit applications
   (OJT)

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/ Parliamentary Procedure CAI I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference)
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)
15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45)

1	2	3	4	5	6	
						16. demonstrate proficiency in using listening skills *(T/ch. 9, 15, 16)*
						17. recognize the dynamics of nonverbal communications *(T/ch. 9, 15)*
						18. complete required business forms and records *(T/ch. 18, 28)*
						19. understand lines of authority *(T/ch. 4, 11)*
						20. identify effective supervisory techniques *(T/ch. 10, 11)*
						Human Resource Foundations: Personality Traits
						21. understand the importance of maintaining good health and proper appearance for effective job performance *(T/ch. 45: L/HR 10, 13)*
						22. exercise self-control *(T/ch. 10: L/HR 10, 18)*
						23. demonstrate dependability and punctuality *(L/HR 5, 10)*
						24. demonstrate productive work habits and attitudes *(T/ch. 11: L/HR 1, 4)*
						25. understand the importance of taking pride in the quality of work performed *(T/ch. 11: L/HR 10)*
						26. recognize the dignity in work *(T/ch. 11)*
						Human Resource Foundations: Self-Development
						27. understand oneself and others *(T/ch. 10: L/HR 2)*
						28. accept and use criticism *(T/ch. 10: L/HR 3, 10)*
						29. identify employment opportunities and preparation requirements in chosen fields *(T/ch. 42, 43, 44, 45)*
						30. identify effective methods to secure and terminate employment *(T/ch. 45)*
						31. develop skills in planning and organizing work *(T/ch. 11: L/HR 10, 22)*
						32. apply required methods and sequences when performing tasks *(L/HR 10)*
						33. apply principles of time management and work simplification when performing assigned tasks *(T/ch. 11: M/Business & Personal Management)*
						OS. explore career possibilities in the business and personal services field *(M/Business and Personal Services Marketing)*

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						34. recognize basic human relationships as they relate to business success *(T/ch. 10, 11: L/HR 1, 9)*
						35. demonstrate characteristics for successful working relationships *(T/ch. 10, 11: L/HR 1, 9)*
						Marketing and Business Fundamentals: Marketing Concepts
						36. understand the role of marketing in American business *(T/ch. 1, 2, 4, 5: L/MB 1)*
						37. learn how marketing is organized by its functions *(T/pp. xviii-xxvi: L/MB 2)*
						38. understand the basic vocabulary of marketing *(T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)*
						39. identify channels of distribution and use appropriate terminology *(T/ch. 6, 7: L/MB 3)*
						40. select appropriate channels for products and services *(T/ch. 7, 24, 29, 30: L/MB 3)*
						Marketing and Business Fundamentals: Business Concepts
						41. interpret and carry out business policies *(T/ch. 2, 4, 39)*
						42. understand how laws, policies, and regulations are applied to business situations *(T/ch. 2, 4, 37, 39: L/EC 16, SE 121)*
						43. identify ethical practices and responsibilities *(T/ch. 4: L/HR 19)*
						44. identify the role and functions of management for reaching business/personal goals *(T/ch. 4, 11, 40, 42)*
						45. understand types of business ownership *(T/ch. 2, 38, 40: L/MB 7)*
						DS. complete housekeeping responsibilities *(M/General Merchandising)*

FUNCTIONS OF MARKETING

						Distribution
						46. understand various inventory systems *(T/ch. 26)*
						47. check incoming stock and complete stock control records *(T/ch. 7, 25)*
						DS. describe the business and personal services industry *(M/Business and Personal Services Marketing)*
						Finance

1	2	3	4	5	6	
						Marketing-information Management
						48. develop computer literacy applicable to marketing occupations *(T/none)*
						49. develop an awareness of specific applications of computers in marketing *(T/ch. 7, 18, 26, 42)*
						Pricing
						Product/Service Planning
						Promotion
						50. demonstrate the ability to merchandise products and services properly *(T/ch. 22)*
						51. understand the role and types of promotion *(T/ch. 5, 14, 19, 23: L/PR 2, 4)*
						DS. maintain displays *(T/ch. 22)*
						DS. decorate business/department *(OJT)*
						Purchasing
						Risk Management
						52. identify and apply safe working practices to all training situations *(T/ch. 27: M/Convenience Store Operations)*
						53. identify external and internal security procedures *(T/ch. 26, 27)*
						Selling
						DS. obtain service information from appropriate sources *(OJT)*
						54. demonstrate the ability to assist a customer in making buying decisions *(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126: Apparel & Accessories [G/McG-H]: M/General Merchandising)*
						DS. address customers properly *(M/General Merchandising)*
						DS. use company promotional materials for selling *(OJT)*
						DS. handle customer inquiries and difficult customers *(M/General Merchandising)*
						DS. provide support services as needed for delivery, special orders, gift certificates, and telephone orders *(OJT)*

MARKETING EDUCATION I - General Marketing
Competency Record and Training Plans

for:_____ of:_____

Resource Legend		Competency Ratings	
T	*Marketing Essentials* - G/McG-H	1	Demonstrates mastery without supervision
M	Materials from ER-EIMC/UT Austin	2	Demonstrates mastery with supervision
L	LAPs - MarkED	3	Does not demonstrate mastery

Grading Period					
1	2	3	4	5	6

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. define marketing as it impacts consumers
   (T/ch. 2, 3, 4, 6, 7, 13, 29, 37, 39)
2. describe the application and use of economic resources in marketing
   (T/ch. 1, 2: L/EC 14)
3. understand how marketing impacts our standard of living
   (T/ch. 2, 3, 4: L/MB 1)
4. analyze the risk and profit motive factor
   (T/ch. 2, 27, 38, 41: L/EC 2, 3)
5. explain the concept of supply and demand
   (T/ch. 2, 38, 39: L/EC 11)
6. identify the role of the entrepreneur in a free enterprise system
   (T/ch. 38, 39: L/MB 7)

Occupationally specific (OS) tasks and related information:_____

Human Resource Foundations: Mathematics

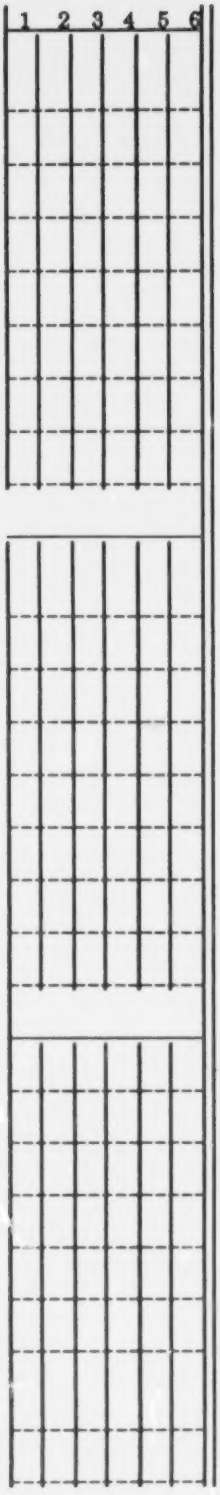
7. demonstrate ability to calculate and verify extensions on purchase orders, invoices, interest, and personal checking accounts
   (T/ch. 18, 25, 28, 32; M/Mathematics: Essential to Marketing)
8. understand and apply markup, markdown, stockturn, personal loan applications
   (T/ch. 26, 30, 31; M/Mathematics: Essential to...)
9. demonstrate proficiency in cashiering
   (T/ch. 18: L/MA 47; M /Mathematics: Essential to...)
10. demonstrate ability to calculate (1) sales slips, (2) credit card purchases, (3) taxes, (4) profit/loss, and (5) payroll
    (T/ch. 8,18,28,,31, 41: L/MA 48, 49; M/Mathematics: Essential to ...)

Personal mathematics *M/Mathematics: Essential to...)*

OS tasks/information _____

Human Resource Foundations: Communications

11. demonstrate skills, characteristics, and responsibilities of leaders and effective group members
    (T/ch. 10: L/HR 9; M/Destination: LEADERSHIP)
12. demonstrate a knowledge of parliamentary procedure principles
    (M/Parliamentary Procedure I, II, III, IV, V)
13. plan and conduct leadership activities
    (ME Fall Leadership Training Conference; *M/ Destination: LEADERSHIP)*
14. prepare for effective citizenship and for participation in our democratic society
    (Chapter Management System-DECA Related Materials Service)



15. identify and demonstrate effective oral and written communication skills and follow through on assigned tasks
    (T/ch. 9, 15, 16, 34, 45; M/Preparing to Succeed in Marketing)
16. demonstrate proficiency in using listening skills
    (T/ch. 9, 15, 16; M/Preparing to Succeed...)
17. recognize the dynamics of nonverbal communications
    (T/ch. 9, 15; M/Preparing to Succeed...)
18. complete required business forms and records
    (T/ch. 18, 28; M/Mathematics: Essential to...)
19. understand lines of authority
    (T/ch. 4, 11; M/Preparing...)
20. identify effective supervisory techniques
    (T/ch. 10, 11 ; M/Preparing...)

OS tasks/information _____

_____

Human Resource Foundations: Personality Traits

21. understand the importance of maintaining good health and proper appearance for effective job performance
    (T/ch. 45: L/HR 10, 13; M/Preparing...)
22. exercise self-control
    (T/ch. 10: L'HR 10, 18; M/Preparing...)
23. demonstrate dependability and punctuality
    (L/HR 5, 10 ; M/Preparing...)
24. demonstrate productive work habits and attitudes
    (T/ch. 11: L/HR 1, 4 ; M/Preparing...)
25. understand the importance of taking pride in the quality of work performed
    (T/ch. 11: L/HR 10); M/Preparing...)
26. recognize the dignity in work
    (T/ch. 11 ; M/Preparing...)

OS tasks/information _____

_____

Human Resource Foundations: Self-Development

27. understand oneself and others
    (T/ch. 10: L/HR 2; M/Preparing...)
28. accept and use criticism
    (T/ch. 10: L /HR 3, 10; M/Preparing...)
29. identify employment opportunities and preparation requirements in chosen fields
    (T/ch. 42, 43, 44, 45; M/Preparing...)
30. identify effective methods to secure and terminate employment
    (T/ch. 45; M/Preparing...)
31. develop skills in planning and organizing work
    (T/ch. 11: L/HR 10, 22; M/Preparing...)
32. apply required methods and sequences when performing tasks
    (L/HR 10; M/Preparing...)
33. apply principles of time management and work simplification when performing assigned tasks
    (T/ch. 11 ; M/Preparing...)

OS tasks/information _____

1	2	3	4	5	6

Human Resource Foundations: Interpersonal Skills

34. recognize basic human relationships as they relate to business success
    (T/ch. 10, 11: L/HR 1, 9; M/Preparing...)
35. demonstrate characteristics for successful working relationships
    (T/ch. 10, 11: L/HR 1, 9; M/Preparing...)

OS tasks/information _____

_____

Marketing and Business Fundamentals: Marketing Concepts

36. understand the role of marketing in American business
    (T/ch. 1, 2, 4, 5: L/MB 1)
37. learn how marketing is organized by its functions
    (T/pp. xviii-xxvi: L/MB 2)
38. understand the basic vocabulary of marketing
    (T/ch. 1, 6, 7, 12, 13, 19, 29, 38, 40, 41, 42: L/EC 10, 13)
39. identify channels of distribution and use appropriate terminology
    (T/ch. 6, 7: L/MB 3)
40. select appropriate channels for products and services
    (T/ch. 7, 24, 29, 30: L/MB 3)

OS tasks/information _____

_____

Marketing and Business Fundamentals: Business Concepts

41. interpret and carry out business policies
    (T/ch. 2, 4, 39)
42. understand how laws, policies, and regulations are applied to business situations
    (T/ch. 2, 4, 37, 39: L/EC 16, SE 121)
43. identify ethical practices and responsibilities
    (T/ch. 4: L/HR 19: M/Preparing...)
44. identify the role and functions of management for reaching business/personal goals
    (T/ch. 4, 11, 40, 42)
45. understand types of business ownership
    (T/ch. 2, 38, 40: L/MB 7)

OS tasks/information _____

_____

FUNCTIONS OF MARKETING

Distribution

46. understand various inventory systems
    (T/ch. 26)
47. check incoming stock and complete stock control records
    (T/ch. 7, 25)

OS tasks/information _____

_____

Finance

OS tasks/information _____

_____

1	2	3	4	5	6

Marketing-information Management

48. develop computer literacy applicable to marketing occupations
(T/none)
49. develop an awareness of specific applications of computers in marketing
(T/ch. 7, 18, 26, 42)

OS tasks/information _____

_____

Pricing

OS tasks/information _____

_____

Product/Service Planning

OS tasks/information _____

_____

Promotion

50. demonstrate the ability to merchandise products and services properly
(T/ch. 22)
51. understand the role and types of promotion
(T/ch. 5, 14, 19, 23: L/PR 2, 4)

OS tasks/information _____

_____

Purchasing

OS tasks/information _____

_____

Risk Management

52. identify and apply safe working practices to all training situations
(T/ch. 27)
53. identify external and internal security procedures
(T/ch. 26, 27)

OS tasks/information _____

_____

Selling

54. demonstrate the ability to assist a customer in making buying decisions
(T/ch. 12, 13, 14, 15, 16, 17, 39: L/SE 108, 126)

OS tasks/information _____

_____

MARKETING EDUCATION II- General Marketing
Competency Record and Training Plan

for:_____ of:_____

Resource Legend		Competency Ratings	
T	*Retail Marketing* - G/M/McG-H	1	Demonstrates mastery without supervision
M	Materials from ER-EIMC/UT-Austin	2	Demonstrates mastery with supervision
L	LAPs - MarkED	3	Does not demonstrate mastery

Grading Period						
1	2	3	4	5	6	

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. analyze the activities of the competition
   (T/ch. 10, 15, 37, 51: L/EC 8)

Human Resource Foundations: Mathematics

2. apply the formula for determining open-to-buy
   (T/ch. 57): M/Mathematics: Essential to)
3. calculate the stock-to-sales ratio
   (T/ch. 26, 32): M/Mathematics: Essential to)
4. understand the terms of an invoice
   (T/ch. 47: M/Mathematics: Essential to)

Human Resource Foundations: Communications

Human Resource Foundations: Personality Traits

Human Resource Foundations: Self-Development

5. develop the skills and attitudes needed by marketing professionals
   (T/ch. 6, 19, 20, 22, 25:)
6. explore career opportunities in marketing
   (T/ch. 3, 6)

1	2	3	4	5	6	
						Human Resource Foundations: Interpersonal Skills
						Human Resource Foundations: Management Skills
						7. identify basic managerial abilities *(T/ch. 9: M/Business and Personal Management)*
						8. understand methods of solving management problems *(T/ch. 25: L/MN 45: M/Business and Personal Management)*
						9. identify and compare management levels, styles, and roles/functions *(T/ch. 8, 27: L/MN 41, 42: M/Business and Personal Management)*
						10. develop skills in planning and organizing work *(T/ch. 25, 63:M/Business and Personal Management)*
						11. recognize elements in personnel management *(T/ch. 25, 26, 27: L/MN 40, 44)*
						Marketing and Business Fundamentals: Marketing Concepts
						12. identify the marketing functions *(T/ch. 14)*
						13. understand the concept of marketing strategies *(T/ch. 11: L/MB 4: Marketing Essentials)*
						14. recognize trends and developments in marketing *(T/ch. 16)*
						Marketing and Business Fundamentals: Business Concepts
						15. identify the types of business ownership *(T/ch. 7: L/MB 7)*
						16. evaluate potential opportunities for business ownership *(T/ch. 7, 9, 58)*
						17. develop a business plan, identifying marketing, financing, and management components *(T/ch. 59, 60, 63. 65)*
						FUNCTIONS OF MARKETING **Distribution**
						Finance
						18. identify sources of business financing *(T/ch. 65)*

1	2	3	4	5	6	
						Marketing-information Management
						19. explain the importance of marketing research *(T/ch. 13, 17: L/IM 2: Marketing Essentials)*
						Pricing
						Product/Service Planning
						Promotion
						20. identify types of promotion *(T/ch. 38: L/PR 3: M/Advertising Basics and Careers)*
						21. develop an annual promotion plan and campaign *(T/ch. 44, 45, 46: L/PR 5, 6: M/Advertising Basics and Careers*
						22. understand the concept of promotional mix *(T/ch. 38: L/PR 1: M /Advertising Basics and Careers)*
						23. use promotion as it relates to other marketing functions *(T/ch. 11, 18: M/Advertising Basics and Careers)*
						Purchasing
						24. explain the elements of a buying plan *(T/ch. 57: L/PU 1)*
						25. analyze and evaluate the criteria for effective buying *(T/ch. 55, 56: L/PU 1)*
						Risk Management
						Selling

PRINCIPLES OF MARKETING
Competency Record

for:_____ of:_____

Resource Legend		Competency Ratings	
T	*Principles of Marketing* - Southwestern	1	Demonstrates mastery without supervision
M	Materials from ER-EIMC/UT Austin	2	Demonstrates mastery with supervision
L	LAPs - MarkED	3	Does not demonstrate mastery

Grading Period						
1	2	3	4	5	6	

FOUNDATIONS OF MARKETING

Economic Fundamentals

Human Resource Foundations: Mathematics

Human Resource Foundations: Communications

Human Resource Foundations: Personality Traits

Human Resource Foundations: Self-Development

1. learn the sources for securing marketing career information
   (T/ch. 2)
2. develop a tentative career plan
   (T/ch. 2)
3. examine the educational needs for achievement of the career selected
   (T/ch. 2)
4. develop an educational and training plan to accomplish the career plan selected
   (T/ch. 2)

1	2	3	4	5	6

Human Resource Foundations: Interpersonal Skills

Human Resource Foundations: Management Skills

5. explore the role of marketing management in achieving business goals
   (T/ch. 19)
6. investigate how marketing plans are developed
   (T/ch. 17)
7. discuss the organization of marketing department staff
   (T/ch. 19)

Marketing and Business Fundamentals: Marketing Concepts

8. define marketing
   (T/ch. 1: L/MB 1)
9. understand the marketing concept
   (T/ch. 1, 19)
10. identify the functions of marketing
    (T/ch. 2: L/MB 2)
11. analyze the marketing mix
    (T/ch. 1)
12. recognize the characteristics of retailers
    (T/ch. 12)
13. identify the characteristics of wholesalers
    (T/ch. 11)
14. explain the characteristics of agents and brokers
    (T/ch. 10, 11)
15. determine the most suitable channel of distribution for various products
    (T/ch. 10: L/MB 3)

Marketing and Business Fundamentals: Business Concepts

16. identify the types of goods
    (T/ch. 7: L/EC 10)
17. define the types of businesses
    (T/ch. 2: L/MB 3, 7)
18. explain the concept of target markets and market segmentation
    (T/ch. 6: L/MB 5)

FUNCTIONS OF MARKETING

Distribution

19. investigate the various modes of transportation used to move products
    (T/ch. 10)
20. discuss storage and warehousing of products
    (T/ch. 10)

Finance

1 2 3 4 5 6

Marketing-information Management

21. analyze marketing problems
    (T/ch. 5)
22. determine the methods of collecting data
    (T/ch. 5)

23. describe how market research information may be interpreted
(T/ch. 5)

Pricing

24. understand pricing as a marketing strategy
(T/ch. 9: L/EC 8)
25. determine factors affecting price
(T/ch. 9: L/EC 2)
26. identify the goals of pricing
(T/ch. 9)
27. explain various pricing strategies
(T/ch. 9: L/EC 8)

Product/Service Planning

28. understanding how new products are developed
(T/ch. 7)
29. describe how new products are tested
(T/ch. 7)
30. explain product life cycle
(T/ch. 7)
31. explore product branding, labeling, and packaging strategies
(T/ch. 7)
32. recognize that services are products
(T/ch. 8)

Promotion

33. understand the importance of promotion in stimulating product demand
(T/ch. 13)
34. explain personal selling as a method of promotion
(T/ch. 14)
35. identify various kinds of nonpersonal selling
(T/ch. 15, 16)

Purchasing

Risk Management

36. understand that reducing business risk is a major goal of business
(T/ch. 2: L/EC 3)

Selling

RETAIL MERCHANDISING
Competency Record

for:_____ of:_____

Resource Legend		Competency Ratings	
T	*Retail Merchandising, 10th Ed.*- Southwestern	1	Demonstrates mastery without supervision
M	Materials from ER-EIMC/UT Austin	2	Demonstrates mastery with supervision
L	LAPs - MarkED	3	Does not demonstrate mastery

Grading Period

1	2	3	4	5	6

FOUNDATIONS OF MARKETING

Economic Fundamentals

1. understand the concept and need of a business producing a profit
   (T/ch. 49: L/EC 2)
2. examine the role of retail merchandising in a free/private enterprise system
   (T/ch. 10)
3. describe the characteristics of different kinds of business ownership
   (T/ch. 12: L/MB 7)

Human Resource Foundations: Mathematics

4. understand the basic calculations related to retailing
   (T/ch. 24, 25, 47, 48, 49)

Human Resource Foundations: Communications

Human Resource Foundations: Personality Traits

Human Resource Foundations: Self-Development

5. explore careers in retailing and selling
   (T/ch. 49)

1	2	3	4	5	6

Human Resource Foundations: Interpersonal Skills

Human Resource Foundations: Management Skills

Marketing and Business Fundamentals: Marketing Concepts

6. understand the various types of retail establishments
   (T/ch. 1, 11, 15)
7. understand the meaning of retailing and merchandising
   (T/ch. 1)
8. understand the role of the consumer in retailing
   (T/ch. 8, 10, 22: L/MB 5)
9. explore trends in retailing
   (T/ch. 8, 52, 53)

Marketing and Business Fundamentals: Business Concepts

10. distinguish between convenience, shopping and specialty goods
    (T/ch. 11, 13, 22: L/EC 10)

FUNCTIONS OF MARKETING

Distribution

11. determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise
    (T/ch. 43, 44)
12. understand the importance of stockkeeping, handling, and caring for stock
    (T/ch. 34, 44, 45)
13. explain inventory control systems
    (T/ch. 45, 47, 50)
14. explain stock turnover
    (T/ch. 21)

Finance

15. understand why retailers offer credit
    (T/ch. 42)

1 2 3 4 5 6

Marketing-information Management

16. determine the kinds of consumer information needed by retailers
    (T/ch. 8, 15)
17. recognize how market research is used by retailers
    (T/ch. 8, 51)
18. identify areas of retail merchandising where computer technology is used
    (T/ch. 38, 52)

Pricing

Product/Service Planning

Promotion

19. understand that advertising, display, and personal selling are the principal forms of promotion
    (T/ch. 5; L/PR 2)
20. recognize the commonly used media for retail advertising
    (T/ch. 28; L/PR 4)
21. understand the basic elements of newspaper advertising
    (T/ch. 29)
22. understand the concept of promotional mix
    (T/ch. 5; L/PR 1)
23. understand the principles of display
    (T/ch. 32)

Purchasing

24. examine the elements and use of a merchandise plan
    (T/ch. 21)

Risk Management

25. recognize the need for general safety practices
    (T/ch. 40)
26. learn ways to prevent shortage, damage, and theft of merchandise
    (T/ch. 39, 44, 45, 47)
27. understand the need for store security
    (T/ch. 40)
28. explain the importance of store policies
    (T/ch. 34, 41)

Selling

29. distinguish between personal and nonpersonal selling
    (T/ch. 36)
30. identify the steps of personal selling
    (T/ch. 6, 36, 37; L/SE 126)
31. recognize the importance of understanding consumer behavior
    (T/ch. 35)

Course Management System

The management of all Marketing Education courses involves decisions related to four major divisions of effort: Environment, Curriculum Planning, Instructional Strategies, and Evaluation. Each teacher-coordinator must personally develop the most effective system for the prevailing local conditions; however, certain considerations are constant across all programs. The discussion that follows presents a format for organizing decisions with suggestions gleaned from Texas teachers of successful students.

Environmental Decisions

Of the three primary environmental factors with which we work (students, curriculum, and teachers), students and their needs must be the central focus of all our efforts. At one time, the students may be seen as our customers (they buy our ideas), our labor force (they do the production work we design), and our product (they become trained/educated, employably competitive citizens). Further, as employed citizens, they become owners of their own destinies. By becoming trained, they can transfer and build on their occupationally specific skills, both laterally and horizontally. By becoming educated, they can begin to see the relationship of their training to future opportunities and to the real-world scenario. As we approach our student/learners, we should apply the marketing concept: satisfied customers have *their needs* met and help to produce successful businesses (ME programs).

The curriculum for each course is prescribed through essential elements. It should be accepted by teacher-cordinator and student alike that the curriculum has been validated by industry and educational personnel. The term *essential elements* gives us a strong mandate for stressing *mastery of each element by each student.*

The teacher-coordinator might be more appropriately thought of as a facilitator of learning whose function is to provide opportunity, exercise, support, and encouragement for the learner. The nature of the marketing course content suggests a businesslike approach to all activity. As a role model, the teacher-coordinator must "walk-the-talk" by being reasonable, consistent, firm, fair, friendly, and by presenting a professional appearance. As a quality manager, he or she must set and require minimum standards of behavior (standard operating procedures) and productivity (grading plan). Students must be given responsibility for making quality decisions, producing quality effort, and claiming accountability for the quality of the results.

Curriculum Planning Decisions

Our task in managing this environmental factor is fourfold: we must (1) verify it for completeness related to each student's career objective, (2) arrange it in an appropriate sequence, (3) subdivide it into manageable/learnable segments, and (4) make it relevant to each learner. A key concept to keep in mind during this process is *balance.*

What is to be mastered must be balanced to include the core marketing competencies, appropriate specialized competencies, and common-to-all citizenship (often learned through DECA activities) competencies. The *resources* from which the learner will receive instruction must also be carefully balanced. In addition to regular text-type books (which have the familiar flavor of school), real-world resources should be introduced as much as possible (to give the energetic and exciting flavor of business). One of the most effective ways for learning to be made relevant is to show the learner a demonstration of the concept/skill in use by someone he or she admires in the real-world. A few ways this demonstration may be accomplished include field trips to training stations, research in trade journals or the *Wall Street Journal,* or through "big-name" guest speaker presentations.

Curriculum guides are available from EIMC-Educational Resources/The University of Texas at Austin, to give recommendations for a scope and sequence for each course. They are based on

input from Texas ME teachers. In addition, the Competency Record/Training Plan forms found in this guide in the part titled "The Total Student Record" are designed to help to implement sequencing of competency introduction/mastery. These forms also allow for the addition of specialized competencies to accommodate individual student career objectives. Major resources are cross-referenced for convenience in planning; however, each teacher-coordinator is encouraged to enrich the forms by adding favorite outside resources. Much of the specialized content needed by co-op students is in individualized publications developed by EIMC-Educational Resources.

A management technique which is helpful to some teacher-coordinators is the use of codes, both colors and numbers. A simple color-coding method which assists with filing is to use a different color of paper for each grading period when duplicating forms for student record-keeping. To subdivide the school year into easily recognized blocks of time, consider designating each grading period with a Roman numeral followed by a colon and an Arabic numeral designating the week of the grading period. An example would be II:6 to represent the sixth week of the second grading period.

Instructional Strategies Decisions

Beginning with the first day of orientation into any Marketing Education course, *students should be made aware of their responsibility to learn* the prescribed curriculum. In order to become an employably competitive citizen, each student must take the responsibility for delivering a usable set of skills and knowledge to a future employer and to his or her own family of the future. In keeping with the businesslike environment mentioned earlier, students should be expected to conduct themselves in businesslike routines.

Many of the competency record and competency record/training plan forms in "The Total Student Record" will assist the student in tracking his or her own progress through the training process. **(See also Appendix B forms titled "Marketing Education Calendar," "Daily Lesson Record," and "Weekly Training Log...Weekly Marketing Journal.")** No attempt is being made in this guide to address specific instructional strategies, since this topic is dealt with in detail in teacher editions of texts as well as the state-adopted curriculum guides. While selecting specific strategies, teacher-coordinators should answer the question, "How does what we are doing fit in the business world?" Students should express the same concern, as well as answering the question, "How do the results in that situation fit with my career goal?" These two questions should apply to process as well as content.

Evaluation Decisions

One of the most difficult tasks faced by any teacher is that of measuring the effectiveness with which a student demonstrates mastery of a skill or concept. The following guidelines should be helpful when organizing ideas about grading and developing a grading plan.

Ask these questions about grading:

- What types of products will be evaluated?
- Which products demonstrate mastery of skills/concepts?
- What minimum standards should be required?
- How does timing relate to the product(s)?
- *How can the learner use the evaluation results?*

Follow these steps when designing a grading plan:

- Decide whether to compute averages or add points for the report card entry.
- Select the categories of work/product which will be evaluated.
- Write a brief description of each category and the standard to be met.
- Describe the range of points or weighted portion of the average for each category.
- Consider offering bonus points for specific above-and-beyond activities.
- Decide how behavioral concerns will affect the grade (if at all).

- Write the plan down and give a copy to each student for student/parent signatures.

A current focus among many educators is on outcome-based education. A major premise of the OBE approach is that evaluation should be directly related to "what the learner knows or can do." What information can he or she use? What skills can he or she demonstrate? When designing a grading plan, the teacher-coordinator should be careful to recognize the difference between behaviors that *should* lead to learning (prompt attendance, good deportment, correct homework assignments, and a happy attitude), and behaviors that *actually* demonstrate acquired concepts and skills (essays, oral reports, written quizzes/tests, and project results). Although it is appropriate to recognize behaviors that lead to learning, the student should not be confused into believing that "moving around is the same as going somewhere." Additionally, a range of opportunities should be given for demonstrating mastery in order to accommodate various learning styles.

Summary and Examples of Decisions

Appendix B has convenient forms for a policy and procedure outline and an orientation outline. These approaches are in use in successful Texas classrooms. However, it should be noted that, as with any effective system, modifications and improvements are continuously being made. Also included are two instruments that are helpful for getting acquainted with students' learning styles and communication skills. It is strongly recommended that a pretest to determine mathematics proficiency be given. An excellent one is found in the *Marketing Essentials Marketing Math Workbook,* which is based on the state-adopted text. Also, pretests and posttests are provided in the EIMC-Educational Resources publication *Mathematics: Essential to Marketing*.

Addressing Special Needs

In the adult world of work, there will always be individuals who learn and work at faster or slower paces than the majority. Because integrating of personnel with ranges of learning styles and paces will occur after the student leaves the educational setting, it is appropriate to create a similar environment in the classroom. Exposure to and cooperation with a cross section of traits and abilities while still in school provides numerous employment preparation opportunities.

Instruction in the essential elements may be modified for students with identified needs, as appropriate, under the provisions of TAC 75.4, which relates to special populations and programs. A number of instructional strategies that may be used to meet the unique educational requirements of the special populations are listed below. Please refer to special needs sections of state-adopted textbooks and curriculum guides for additional listing and discussion of individualized strategies. The newest curriculum guides from EIMC-Educational Resources include a section on special needs adaptations.

Instructional Strategies

Grouping. The ME teacher can often be more effective in instructing special populations when they are arranged in homogeneous groups of various sizes according to their occupational goals, interests, or ability levels. Heterogeneous grouping is also necessary to develop cooperative skills necessary for success in real-world occupational settings. Individual responsibilities within a group should vary according to the desired outcome for each student.

Pacing. The ME teacher can accommodate the different rates of learning by allowing more time for slower students and providing enrichment for others. All students should be expected to perform each assigned task up-to-standard; however, all students need not perform exactly identical tasks. Individualized instruction according to occupational objective provides many opportunities to remediate and reteach special populations of students.

Teacher-learner contracts. The ME teacher can develop a contract with the special populations student which addresses the specific details (task, time limit, procedures, expected results, rewards/consequences, signatures by all parties). Students can be expected to assume more personal responsibility for learning when they have received and accepted a formal statement of expectations. Further, students can track their own progress, identify their own mistakes, and propose their own solutions to problems as they work through a specific sequential set of procedures.

Support aides. The ME teacher can use the volunteer services of classroom peers, parents, and others to assist special learners in mastering concepts. Computer-assisted instruction, manipulatives, and developmental projects promote active learning experiences. Brief or extended internships may be arranged in the business community for students needing practical experience before seeking employment.

Subdividing information into smaller portions. The ME teacher can divide an instructional concept into smaller, more easily mastered bits of information. Students may then assimilate components of information into a mastered competency. It is important for each student to experience success in small steps leading to success in large projects. Students should develop skill in transferring small component skills into various applicable situations.

Motivational environment. The ME teacher should provide a supportive atmosphere for learning for all students, giving constructive feedback when necessary as might occur on the job. Each student should receive appropriate personal words of encouragement daily in order to feel a sense of accomplishment. Students should develop personal goals for learning and relating individual concepts and skills to their occupational objective.

Equitable distribution. The ME teacher must give diligent attention to providing equal opportunity to participate in class activities for each student on a daily basis. Each student should

be heard responding in class discussion, receive appropriate feedback according to the response, and be made to feel comfortable and valuable in each class each day.

Nonnative Speakers of English

Nonnative speakers of English provide challenges and opportunities to the Marketing Education teacher. One of the first challenges is that many nonnative students arrive in the United States with only minimal competence in understanding written and/or oral English. Although many of these students have had many more years of study of the English language than any U.S. students have had in a foreign language, classroom instruction is still not adequate preparation for total immersion in an English-speaking culture. It is helpful to call on the student before asking him/her a question, in order to allow plenty of time for the student to hear the question, translate it into the native language, formulate an answer in the native language, and translate it back into English. Writing information on the chalkboard or overhead transparencies enables the student to correctly copy the information in order to follow up with additional study/translation afterwards.

A second challenge these students face is that the technical terminology throughout the marketing curriculum compounds the basic language deficit. Consider the difficulty that native speakers of English have in mastering the technical marketing jargon, and one can understand the difficulty nonnative speakers have. One might begin introducing jargon with synonyms, such as *stores* for *retailers*, realizing that the words may not be perfectly defined.

An additional challenge is understanding the slang expressions used by classmates and instructors. Nonnative speakers may feel left out of humorous and/or serious exchanges among students when slang expressions are used. One example of such a challenge would be a description of professional shoplifters "casing the joint," to determine how easy it might be to steal from that store. The "buddy system" might be used to pair a willing student with the nonnative student in order to translate the exchanges when necessary. When the instructor must be absent, be certain to let the substitute know about the "buddies."

A final challenge the nonnative student faces is comprehending basic abbreviations, since their foreign language/English dictionaries rarely contain even the most basic business abbreviations, such as *mdse* for *merchandise*. The instructor might compile, duplicate, and distribute a list of commonly used abbreviations so that the nonnative speaker has a ready reference to be used during class and while studying at home. The use of such a list might be appreciated by native speakers, as well.

The preceding paragraphs might indicate that having nonnative speakers in the marketing classroom is a hardship for the instructor. Any minor inconveniences are easily offset by the experience that nonnative students can relate, which will benefit other students, as well as the broadening of the range of curriculum in international marketing. One opportunity that nonnative students can give to their classmates is to open the doors of their homeland to our untraveled students. Have these students bring copies of popular magazines so that advertisements may be studied. Even with the language difference, the basic components, such as headline, copy, and illustration, are universal.

Another opportunity is to reinforce the importance of world geography to our students. The nonnative students can show local youth the locations of their homelands, where they first arrived into the United States, and how they traveled to get to their present hometown. Having maps of the world, the United States, and Texas posted in the classroom can facilitate discussion across the marketing curriculum to help native and nonnative students identify such locations as the corporate headquarters of Procter and Gamble in Cincinnati, Ohio, or of HEB in San Antonio.

If a major written project is a component of instruction, one might consider having the nonnative student prepare a "photo project," such as taking a picture tour through a supermarket or clothing store in his or her homeland. The student's family would need to take photographs, have them developed, and send them to the student, who would then mount them, label them, and present them to his or her classmates. This project could be left in the classroom as a gift for use with future classes.

The above information has been tailored for students enrolled in the cluster/semester marketing courses. Should a nonnative student wish to enroll in ME I, he or she will need to have a work permit ("green card") prior to the job interview. As high school guidance personnel look for appropriate instruction for nonnative students, they should be encouraged to consider placing such students in a marketing cluster class where all students can achieve.

Three useful publications for teachers or administrators with students with limited English proficiency are available from EIMC-Educational Resources:

- *Developing Programs for LEP Students in Vocational Education*
- *LEP Handbook for Co-op Teachers* (of LEP students)
- *Conference Leader's Guide for ACCESS Team-Workshop for Teachers with LEP Students*

Section III: Chapter Management Responsibilities
of the Marketing Education Teacher-Coordinator

DECA Organization
DECA Resources
DECA Chapter Management Calendar
DECA Clip Art

DECA Organization

This *Program Management Guide* makes reference to activites described in detail in the *Chapter Management System*, a National DECA publication. Such activities include starting a DECA chapter, parliamentary procedure, program of work, sales projects, and officer installation/membership initiation ceremonies. Also included are a number of blank master forms.

The system is published in a loose-leaf binder and is helpful to both new and veteran chapter advisors. It is available from DECA Related Materials, 1908 Association Drive, Reston, VA 22091. Dr. Ed Davis is executive director of National DECA.

From National DECA, active DECA chapters receive such annual services as the *DECA Guide*, DECA calendars, specially designed sales projects, and motivational competition and career development posters. Member services include membership cards and pins, subscriptions to *DECA Dimensions*, scholarship opportunities, competitive event awards, and leadership experiences. Membership jewelry, apparel, stationery, and other items are offered through a catalog service.

Through DECA, Texas Association, members are introduced to a variety of applications for marketing skills and concepts in the business community. Specialized leadership training is provided for groups of officers and members across the state. Through a sequential set of competitive activities, members are encouraged to relate marketing concepts learned in the classroom to practical situations. Mr. Emmett Eary, an occupational specialist at the Texas Education Agency, serves as Texas DECA Advisor.

Texas DECA membership is divided geographically into ten districts. These districts are organized through the leadership of teacher-coordinators who work in teams to conduct leadership and competitive activities.

Local DECA chapters are the heart of the organization as they provide the initial opportunity for individual membership and ongoing activities. Through the local chapter, working individually and in groups, members develop a full range of organizational, civic, social, and competitive skills.

History of Texas DECA

DECA, Texas Association, was founded in 1946 to provide leadership and competitive training for students enrolled in Distributive Education (now Marketing Education) courses. Texas DECA was one of the 17 state associations that founded National DECA in 1946 and hosted its first state conference at the Hotel Adolphus in Dallas on March 1, 1947.

From its beginning in 1946, Texas DECA has been the largest state association in National DECA. Texas DECA travels with several hundred members serving as competitors in and delegates to the National Career Development Conference each year and is proud to be the only vocational student organization in the state lending significant financial support for competitor expenses.

It is with great pride that Texas DECA has sponsored officers for the national organization, with seven students having served as National DECA President. Since the initial national conference, Texas DECA has shown its gracious hospitality by hosting the national event on four occasions: 1954—San Antonio, 1968—Houston, 1971—San Antonio, and 1979—Houston. Fort Worth, Houston, and San Antonio have also hosted the Southern Region Fall Leadership Conference.

Formal leadership for Texas DECA is provided by the State Action Team (officers) who are busy throughout the year. These members serve as official representatives at many chapter, district, state, and national events. Although the original name of the student organization was Distributive Education Clubs of America, with the acronym of DECA, the current name is DECA used as a word. Various uses of the new DECA logo are included in this section. Additional clip art is located in your *DECA Guide*.

DECA Resources

An effective local chapter will use the many resources specifically designed to enhance DECA, An Association of Marketing Students. Major providers of materials and supplies are listed below.

National DECA headquarters provides the following items at no cost for affiliated chapters:

DECA Dimensions—a member's journal published four times a year
DECA Advisor—an advisor's journal published as a companion for *DECA Dimensions*
DECA member and advisor pins and membership cards—forwarded in response to DECA Roster
DECA calendar and posters—furnished compliments of National DECA Advisory Board
DECA Images Catalog—illustrating member, chapter, advisor, gift, and award items
DECA Guide—providing descriptions of DECA events with guidelines and evaluation tools

DECA Images Catalog features a wide range of chapter management and competition support items. Several of the all-time favorite items are listed below:

Chapter Management System
Handbook for DECA Chapters
Guide for DECA Chapter Officers
Effective Public Relations for Student Groups
Effective Leadership
Destination Leadership
"Student Training Guides" (for series events)
"Comprehensive Exams" (software and hard copies)
"National Competitive Event Winners" (chapter projects and individual written events)
"Merit Awards Program Handbook"

EIMC-Educational Resources/The University of Texas at Austin, offers a wide range of occupationally specific individualized study manuals and computer-assisted instruction materials. These materials are useful when preparing for competition or leadership roles, both in DECA and in life.

MarkED Resource Center in Columbus, Ohio, is another major provider of DECA support materials. Curriculum materials, as well as computer-assisted test banks, aid students in gaining competitive expertise while mastering foundational and fundamental marketing concepts in class.

The Texas Education Agency staff provides leadership services and materials for Texas DECA. Seven of the annual mailings are listed below.

DECA Roster, DECA Facts Sheet, Texas DECA organizational and officer candidate materials
District Leadership Training Conference Information Kits
Southern Region Leadership Training Conference Information Kits
District Career Development Conference Information Kits
Texas Career Development Conference Information Kits
National Career Development Conference Information Kits
Texas Diamond—a newsletter for members produced with the State Action Team

DECA Chapter Management Calendar

Appendix B provides a calendar for planning and keeping track of what must be done to manage a DECA chapter. (See **DECA Chapter Management Calendar** in Appendix B). The following tasks might be included:

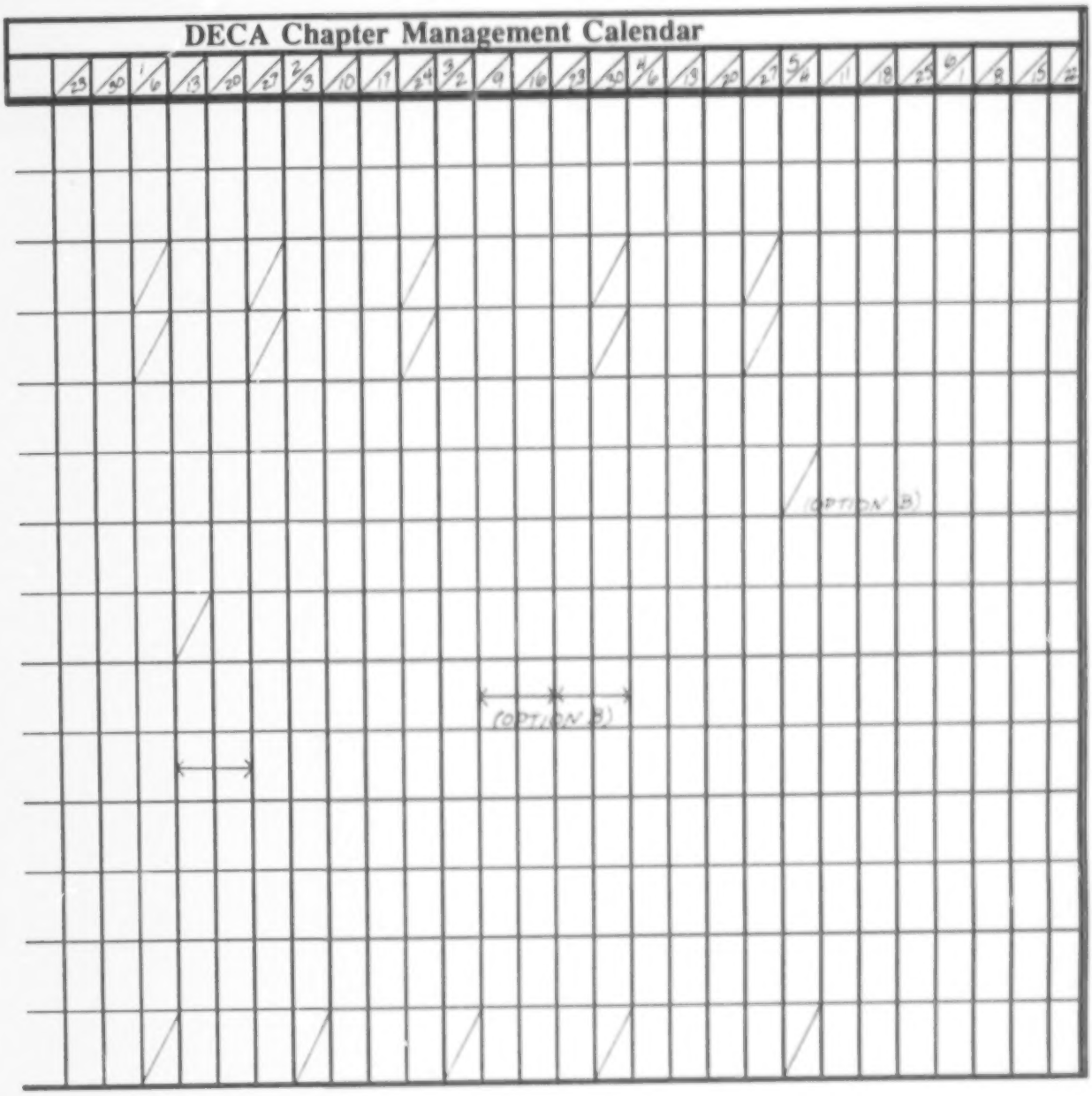
Develop program of work and budget
Plan and conduct parent/employer orientation meeting
Participate in executive committee meeting
Participate in standing committee meeting
Participate in project committee meeting
Elect new officers
Submit dues
Submit article to *DECA Dimensions*
Plan and conduct sales project
Submit chapter news to *Texas Diamond*
Participate in district Leadership Training Conference (LTC)
Participate in new member initiation
Participate in officer installation
Attend DECA meeting
Participate in Southern Region LTC
Prepare for DECA competitive events
Plan and conduct civic activity
Attend social activity
Participate in DECA District Career Development Conference (CDC)
Plan and conduct employer appreciation event
Plan DECA Week promotion
Participate in Texas DECA CDC
Participate in National DECA CDC

An example of a calendar developed by one teacher is provided on the next four pages, as guidance in planning the year.

DECA Chapter Management Calendar

Tasks Weeks>	8/19	8/26	9/2	9/9	9/16	9/23	9/30	10/7	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16
Develop program of work and budget	←	—	→															
Plan and conduct parent/employer orientation meeting			←	—	→													
Participate in executive committee meeting		PRIOR TO EACH MONTHLY MEETING																
Participate in standing committee meeting		WHEN NEEDED																
Participate in project committee meeting		APPROPRIATE AS PROJECTS ARE IN PROGRESS																
Elect new officers		AT FIRST MEETING (OPTIONAL)																
Submit dues and DECA roster	←	—	—	—	—	—	→											
Submit article to *DECA Dimensions*																		
Plan and conduct sales project				←	—	—	→											
				(OPTION A)														
Submit chapter news to *Texas Diamond*				←	—	→												
Participate in district Leadership Training Conference (LTC)					←	—	—	—	—	—	—	—	→					
Participate in new member initiation					OR													
Participate in officer installation																		
Attend DECA meeting																		
(Continued)																		

DECA Chapter Management Calendar



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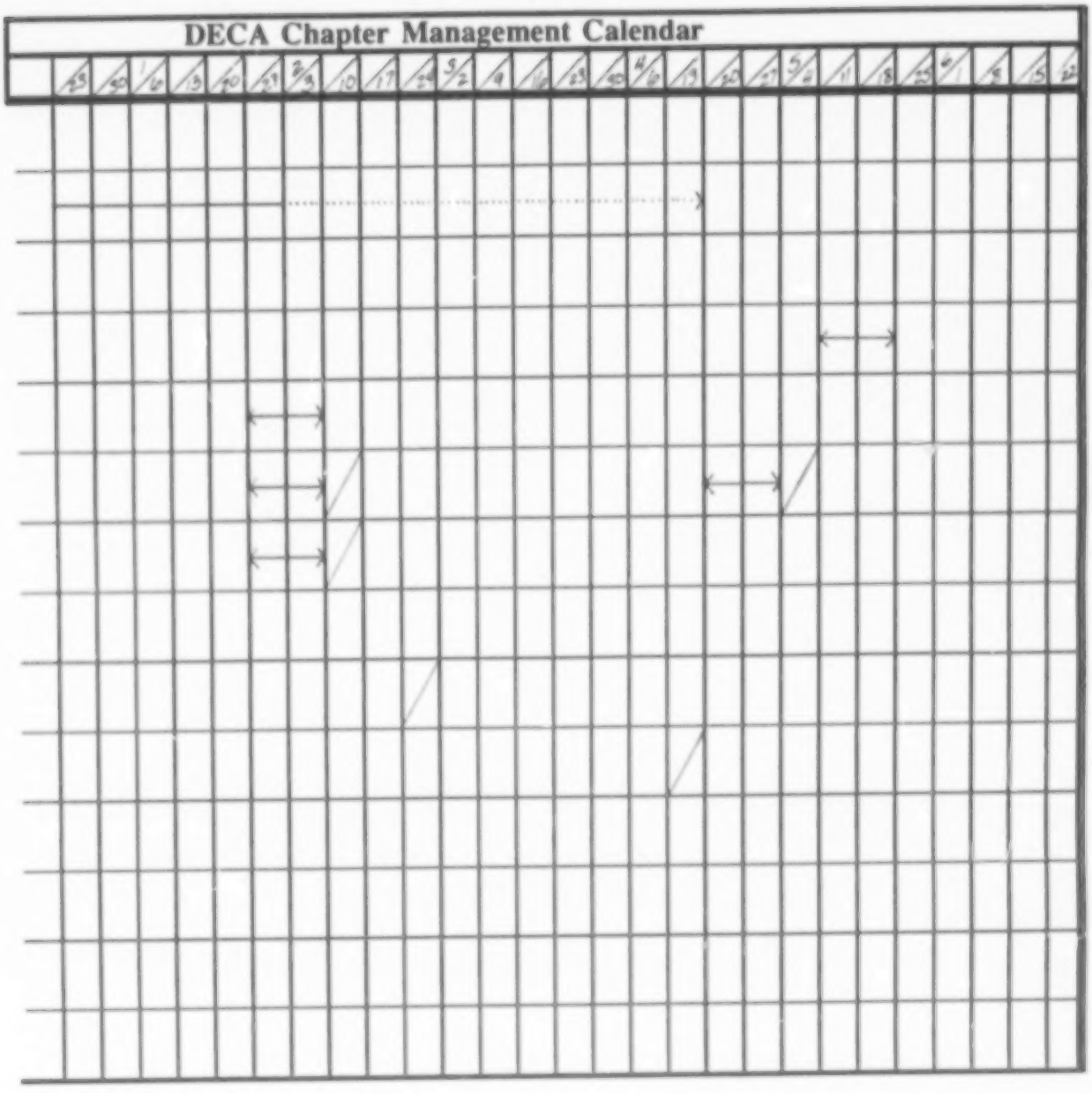
DECA Chapter Management Calendar

Tasks Weeks>	8/19	/26	9/2	/9	/16	/23	/30	10/7	/14	/21	/28	11/4	/11	/18	/25	12/2	/9	/16
Participate in Southern Region LTC																		
Prepare for DECA competitive events												←						
Plan and conduct civic activity												←			→			
Attend social activity																	←	→
Participate in DECA District Career Development Conference (CDC)																		
Plan and conduct employer appreciation event																		
Plan DECA Week promotion																		
Participate in Texas DECA CDC																		
Participate in National DECA CDC																		

DECA Chapter Management Calendar



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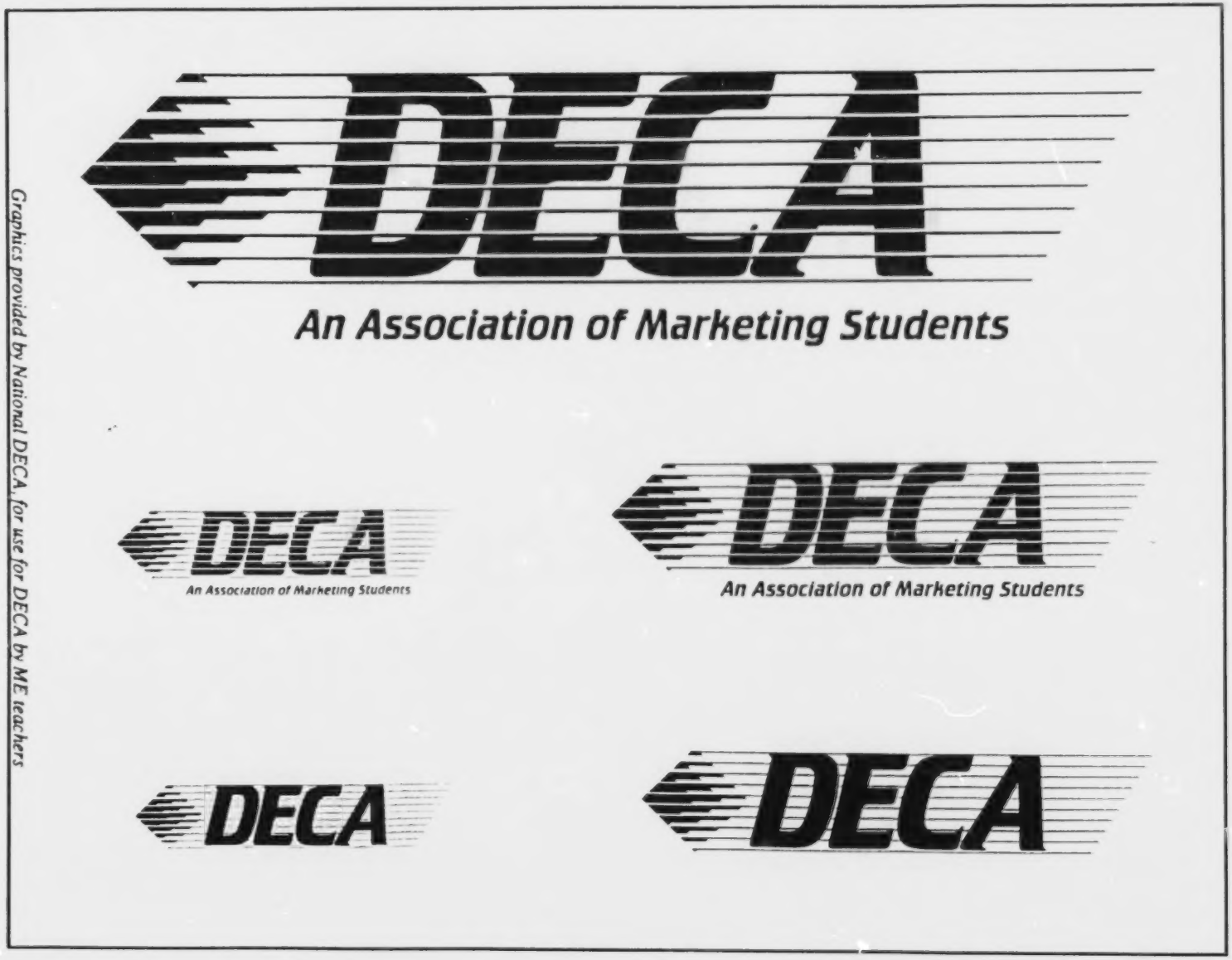
DECA Clip Art

The next two pages provide master copies for graphics that can be useful in conducting a DECA program. They may be copied by Marketing Education teacher-coordinators who sponsor DECA chapters, for use in their programs. They may not be copied for commercial use of any kind, such as inclusion in a publication for sale.

The first page is made available through the courtesy of Texas DECA and National DECA, Reston, VA. Additional camera-ready copies of the Texas DECA logo are available from DECA, Texas Association, P.O. Box 13062, Austin, TX 78711.

National DECA symbols are on the second page, and they and other logos are available from DECA, 1908 Association Drive, Reston, VA 22091.

Graphics provided by Texas DECA, for use for DECA by ME teachers



Graphics provided by National DECA, for use for DECA by ME teachers

Section IV: Professional Development Responsibilities
of the Marketing Education Teacher-Coordinator

Professional Improvement Conference
District Concept
Professional Organizations and Activities
Professional Clip Art

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Professional Improvement Conference

To provide continuing education for marketing educators in Texas, the Texas Education Agency (TEA) sponsors an annual summer Professional Improvement Conference (PIC), the site of which rotates among the major metropolitan areas of the state. The PIC is conducted under TEA contract with one or more of the Texas universities offering teacher education for marketing educators: University of Houston, University of North Texas, and Southwest Texas State University.

Sessions and opportunities offered during the four-day conference include:

- updates of rules, regulations, and guidelines
- review of new curriculum materials
- effective teaching strategies
- field trips/tours to support marketing curriculum delivery
- informal teacher-idea share sessions
- motivational speakers from the marketing industry
- executive meetings of professional and leadership organizations
- professional organization annual meeting
- district planning/organizational meetings
- project advisory committee meetings
- exhibits
- and more

It is traditional for teachers to be offered Advanced Academic Training (A.A.T.) credit for participation in PIC if they are not attending the conference on contracted days with their local district. Most local districts reimburse teachers for direct travel expense and a per diem for meals.

For teachers planning to manage highest quality Marketing Education programs, the summer Professional Improvement Conference is a "must-do" activity. It is both motivational and informative; in addition, it provides outstanding networking opportunities.

New teacher orientation is also provided at the same time and location as PIC.

Many Texas teachers have developed unique and highly successful approaches to various teacher-coordinator responsibilities. These individuals are often scheduled as presenters at PIC. Other conferences where Texas marketing educators have been recognized for outstanding professional contributions include the American Vocational Association convention, the National Marketing Education conclave, National DECA Leadership Development Academy, Texas School Administrators Mid-Winter Conference, Texas Community Schools Summer Conference, and the Baylor University Free Enterprise Teacher-of-the-Year Award.

District Concept

The State of Texas is divided geographically into ten (10) districts for the purpose of organizing Marketing Education operations. Student activities take place, initially, within the districts. Typical fall activities include a leadership training conference for all ME students, followed by informal mini-contests for practice before official competition. In mid-winter, the District Career Development Conferences are held in each district to select finalists for state competition. District officers are also elected at these meetings. There is a great spirit of comradeship among students attending these events. Lifetime friendships are made as young people build bonds through the various trips to district, state, and national conferences. Sharing programs between schools often develop.

Districts plan budgets for fall leadership and spring competitive conferences. Teachers within the districts volunteer to host the conferences and make local arrangements for meetings, lodging, meals, stage decor, T-shirts, photographers, judges, and entertainment. All teachers accept responsibilities to assist in making the conferences successful. Advisors of the district officers work as a team to prepare them to function at the annual business meeting and conduct the opening and closing ceremonies of conferences.

Each district's activities are organized by teams of teachers within the district. Four teachers from each district are elected at the summer professional improvement conference to fill the following roles for the upcoming year(s): District Director; Chairperson, Leadership Committee; Chairperson, Curriculum Committee; and Chairperson, Professional Development Committee. Under the direct supervision and guidance of the State Director of Marketing Education Programs, Berry Sullivan, and his staff, the District Leadership Teams conduct meetings and lead in organization of district business. This system provides opportunities for all teachers to communicate and work together toward common goals to enhance opportunities for the students.

The following persons have important responsibilities in district activities:

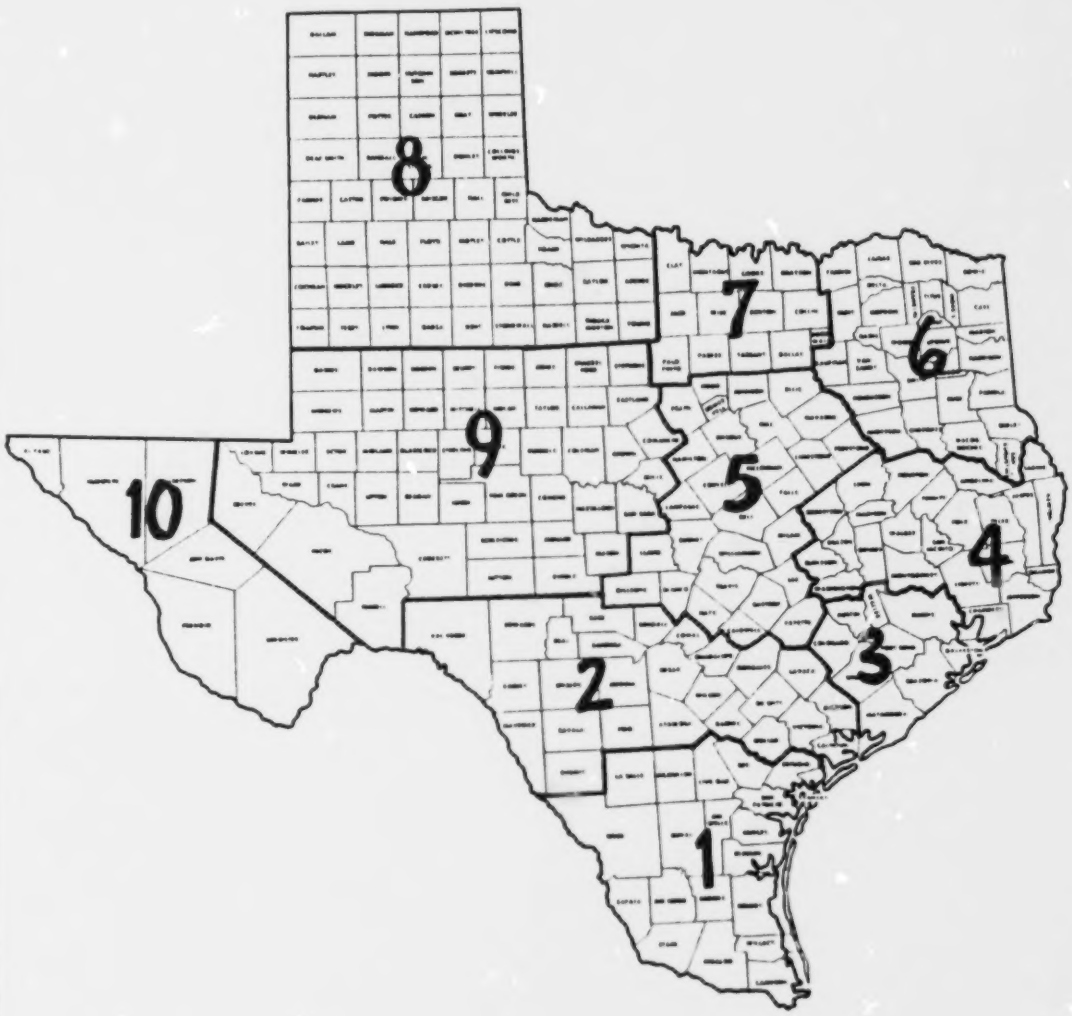
District Director works closely with TEA staff and committee chairpersons to provide communication and leadership for the overall district action plan.

Leadership Committee Chairperson accepts responsibility for leading the efforts to produce the fall leadership conference. Also, assistance and direction are given toward District Career Development Conference and officer activities.

Curriculum Committee Chairperson assists with review of curriculum materials and serves as the district representative to MECATF (Marketing Education Curriculum Advisory Task Force), an advisory group for EIMC-Educational Resources/UT Austin, which develops curriculum materials for Marketing Education programs in Texas.

Professional Development Committee Chairperson cooperates with TEA staff in planning and implementing activities for the summer conference. This committee often functions through "quality-share circles" on the district level.

MARKETING EDUCATION DISTRICTS SINCE 1989-90



Professional Organizations and Activities

American Vocational Association (AVA) is the national umbrella organization for all disciplines within vocational education. The Marketing Education Division of AVA sponsors special workshop sessions and meetings during AVA conferences. The *Vocational Education Journal* is published by AVA as a service to its membership.

- **Texas Vocational Teachers Association (TVTA)** is the state umbrella organization for all disciplines within vocational education.

- **Texas Vocational Consortium (TVC)** is a political action committee formed by several vocational professional organizations to be an advocate for the special interests of the group with the Texas Legislature.

DECA, Professional Division, is open to all chapter advisors, local and state supervisors, teacher educators, and other support groups directly involved with ME and DECA. It provides direct communication with the National DECA staff and Board of Directors and encourages support and assistance to the entire organization. Each ME teacher is expected to affiliate with the Professional Division of National DECA. Services provided to Professional Division Members include official membership pin, DECA Advisor publications, *DECA Dimensions* magazine, and professional improvement sessions conducted concurrently with National DECA Conferences.

EIMC-Educational Resources is part of the Division of Continuing Education at the University of Texas at Austin. It develops instructional materials for Marketing Education, as well as for Health Occupations Education, Industrial Technology, Special Needs/At Risk, and Trade and Industrial programs. Educational Resources is closely linked with vocational educators in each program, with teachers serving on advisory committees and as materials developers. Two groups are especially important to Educational Resources: MECATF and the Project Advisory Committee:

- **Project Advisory Committees (PAC)** are selected from the membership of MECATF plus teacher-educators, TEA staff, and business/industry personnel. These individuals work closely with the UT-EIMC staff to supervise development of curriculum and other support materials for use in ME programs.

- **Marketing Education Curriculum Advisory Task Force (MECATF)** functions to provide input to TEA and the Extension Instruction and Materials Center of the University of Texas at Austin with regard to the development and revision of instructional materials produced by EIMC. The district curriculum chairperson, who is elected at a district meeting held in conjunction with the summer PIC, serves as the district's representative for MECATF. Members of MECATF and selected others serve on Project Advisory Committees, which are responsible for advising the developers of new materials.

Marketing Educators Association (MEA) is the national umbrella organization for marketing educators. Through active executive and standing committees, MEA leads in providing top conferences, promotional materials, and communication with Congress and agencies whose decisions affect Marketing Education programs. At the annual Marketing Education Conclave, MEA sponsors professional development workshops, a President's Institute, a major social event, and introduction of the newest materials for use by marketing educators. Through the MEA products catalog, many promotional and image items are sold to members at a 50 percent discount. MEA members receive complimentary copies of *Perspectives, Marketer's Memo*, and *Action Briefs*.

- **Marketing Educators of Texas (MET)** is the state organization for marketing educators on all levels. Officers and committees function on the state and district levels. At the annual meeting held in conjunction with PIC, MET presents years of service awards to its members and outstanding teacher awards to one teacher from each of the ten districts. One teacher is chosen each year as Outstanding Marketing Educator of the Year, and this individual is sponsored in a national competition through the American Vocational Association.

MarkED Consortium is sponsored by the Marketing Education Resource Center, Inc., and is located in Columbus, Ohio. The Center provides curriculum and related services to marketing educators across the country. Membership in the consortium is gained by states through the leadership of the state staff. Fees are paid on the basis of total numbers of teachers in the state. Texas is a member state, which allows all Texas ME teachers to purchase MarkED materials at a 40 percent discount. Professional opportunities to field-test materials, participate in national seminars and surveys, and receive specialized program development training are available to Texas teachers. Since 1983, MarkED has sponsored Model Program Internships to selected teachers across the nation. Each Model Program Intern receives intensive professional training and supervision for a two-year period. Model Program Interns learn to develop industry-based curriculum for delivery through an outcome-based system for mastery learning. MarkED is one of several cosponsors of the National Marketing Education Conclave held each summer in a major city in the United States.

Marketing Education Foundation was formed by professionals from business and industry as a not-for-profit foundation to assist ME programs in Texas. In addition to offering significant financial support, foundation members provide expertise for developing promotional materials, serve as judges for competitive events, assist in recruitment of qualified training stations, and give vital feedback regarding state-of-the-art marketing strategies.

Teacher-Educators: Three universities—Southwest Texas State University in San Marcos, the University of Houston, and the University of North Texas in Denton—provide certifying programs for Marketing Education teacher-coordinators. The teacher-educators play a vital role in the success of ME programs across the state. In addition to conducting advanced level courses year-round, these individuals are available to serve as consultants for local programs, and district, state, and national conferences.

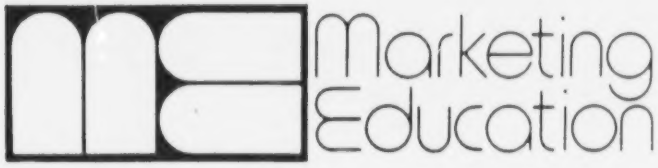
Tech Prep Consortia—Tech Prep programs result from the cooperative efforts of secondary and postsecondary institutions. They provide six-year programs which begin in ninth grade and culminate with honors Associate of Arts programs. Flexibility is provided, with career pathways that allow for both vertical and lateral movement of students. Each student leaves high school with several college credits. The aim is to ensure that students who complete the program will get better jobs with the AA degree.

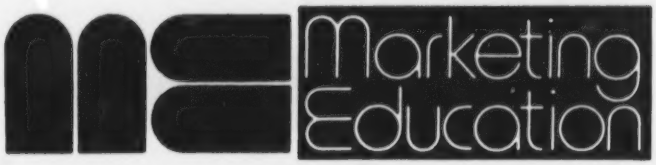
Professional Clip Art

The clip art that follows may be helpful in promoting a Marketing Education program. It was provided by the Texas Education Agency and the Marketing Education Association. The art may be copied by teacher-coordinators for use in program promotion and professional activities. High-quality glossies for reproduction of the second page are available from the Marketing Education Association, P.O. Box 12208, Columbus, OH 43212-0208.

This wreath is reproduced with the permission of the Texas Education Agency and may be copied for use in Marketing Education programs.

committed to the improvement of marketing





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Appendix A: Rules and Regulations

Preparation for Vocational Monitoring
Form for Self-Evaluation of Local Programs and Courses

Preparation for Vocational Monitoring

Vocational education compliance monitoring teams from the Texas Education Agency actually look at many aspects of the school's operation—from compliance with federal and state laws to State Board of Education Rules and Administrative Code. Individual teachers do not need to be concerned with many of the items on the monitoring checklist because they are items that will be addressed by central office or business office staff. **Teachers should always check with local administrators for most current guidelines. Listed below, however, are records and information most often sought.**

_____ Competency profiles for each student enrolled in occupationally specific courses (ME I, ME II, and specialized programs)

_____ Curriculum guides/documents for each vocational education subject taught

_____ Daily or weekly lesson plans to document effective planning for instruction

_____ Local evaluation of program(s) for quality and effectiveness—evaluation instrument used with results of the evaluation. How are the results being used to improve vocational programs?

_____ Vocational completer and follow-up reports (1 year)

_____ Location and use of equipment purchased with federal vocational funds

_____ Training station visitation records

_____ Student Training Plans (VOC-044R or other approvable formats)

_____ Student referral records to document where student applicants were sent for interviews

_____ Did students have the opportunity to participate in vocational student organization activities related to the program in which they are enrolled?

_____ Admission criteria for enrollment into the program—is it nondiscriminatory?

_____ Student eligibility (Texas Daily Register of Pupil Attendance)

_____ Did the school district apply for and receive permission from the Agency to operate cluster courses? (SAS-309R Annual Application)

_____ Makeup of local advisory committee—representation from each program

_____ Teacher schedules

_____ Student schedules (randomly selected)

_____ Enrollments (by class period and total)

_____ Teacher certification or, if on a permit, statement of qualifications

_____ Facilities—equipment, safety, etc. (observation)

_____ IEPs for students ARDed into the programs

Marketing Education

Self-evaluation of Local Programs and Courses

Evaluating Program Components

In evaluating your local program, circle the number best describing the situation according to the following scale:

5 program greatly exceeds standards
4 program somewhat exceeds standards
3 program standards are met
2 minor program improvements needed
1 major improvements needed
0 item not applicable to local program offered

A. Quality and Availability of Instructional Offering

1.	Instruction is competency-based.	5 4 3 2 1 0
2.	Instructional objectives are based on the essential elements defined in *Chapter 75, Curriculum.*	5 4 3 2 1 0
3.	A competency profile is maintained for each student enrolled in Marketing Education (ME) occupationally specific courses.	5 4 3 2 1 0
4.	Local ME courses are open to all students regardless of race, sex, ethnic origin, handicapping condition, or limited English proficiency.	5 4 3 2 1 0
5.	Appropriate and sufficient instructional resource materials are available to the students.	5 4 3 2 1 0
6.	Student achievement of goals and objectives is measured by standard proficiency measures and criterion-referenced tests.	5 4 3 2 1 0
7.	Curriculum guides are available and used for instructional planning.	5 4 3 2 1 0
8.	The instructional resource materials include individualized study information related to the student training stations and/or career objectives.	5 4 3 2 1 0
9.	Instructional planning reflects activities that address the reinforcement and/or application of basic academic skills.	5 4 3 2 1 0
10.	Daily lesson plans include a good assortment of learning activities.	5 4 3 2 1 0
11.	The instructional planning includes provisions to help students develop problem-solving and higher level thinking skills.	5 4 3 2 1 0

B. Advisory Committees

1.	The ME program is supported by an active local advisory committee made up of business persons and local leaders.	5 4 3 2 1 0
2.	The advisory committee meets regularly and is abreast of the program purposes and program operations.	5 4 3 2 1 0
3.	At lease one local ME advisory committee member serves on the local district advisory committee for vocational education.	5 4 3 2 1 0

C. Enrollment and Follow-up

1.	Enrollment in the ME program indicates strong student interest and demand for the training the program offers.	5 4 3 2 1 0
2.	Enrollment is at a level that allows the teacher-coordinator to operate the full scope of the ME program.	5 4 3 2 1 0
3.	The ME teacher who instructs a handicapped student, or a representative, participated in the Admission, Review, and Dismissal (ARD) Committee deliberations.	5 4 3 2 1 0
4.	The ME teacher who instructs a handicapped student participated in the development of an Individual Education Plan (IEP).	5 4 3 2 1 0
5.	Students receive guidance and counseling in making the decision to enroll in the ME program.	5 4 3 2 1 0
6.	Follow-up data are maintained for program completers and leavers for at least one year.	5 4 3 2 1 0
7.	Follow-up data are used to improve instructional objectives and to evaluate the overall effectiveness of the ME program.	5 4 3 2 1 0

D. Facilities and Equipment

1.	Facilities housing the ME program are of sufficient size to operate the full scope of the program.	5 4 3 2 1 0
2.	The ME program is sufficiently equipped to provide training for current and projected occupational needs.	5 4 3 2 1 0
3.	Adequate operating funds have been budgeted to purchase new, or replace outdated and wornout, equipment for the program.	5 4 3 2 1 0
4.	Students have access to computer hardware and application software related to marketing employment.	5 4 3 2 1 0

E. Cooperative Programs

1.	Adequate time is scheduled during the school day to allow the ME teacher to coordinate students' on-the-job training.	5 4 3 2 1 0
2.	Written training plans which include the essential elements and additional experiences are developed for each student.	5 4 3 2 1 0
3.	Students are placed by the ME coordinators in occupations approved for ME training.	5 4 3 2 1 0
4.	Continuous evaluation of student progress is made by the teacher and the training station supervisor.	5 4 3 2 1 0
5.	Travel funds are available to allow the teacher to make training station visits.	5 4 3 2 1 0

F. Professionalism

1.	The ME teaching staff regularly attends inservice training meetings for professional development.	5 4 3 2 1 0
2.	Required program reports are submitted in an accurate and timely fashion.	5 4 3 2 1 0
3.	ME facilities are kept neat, clean, and orderly.	5 4 3 2 1 0
4.	The ME teaching staff is involved in activities to keep up to date with current marketing and merchandising programs.	5 4 3 2 1 0

G. Program Goals and Objectives

1.	Clearly written program goals and objectives, considering the needs and interests of students, have been developed.	5 4 3 2 1 0
2.	Student selection is based on interest and aptitude for entering a marketing organization.	5 4 3 2 1 0

H. Youth Organization

1.	All students enrolled in ME courses are encouraged to become members of DECA.	5 4 3 2 1 0
2.	Goals and objectives of the youth organization have been prepared with the assistance of chapter members.	5 4 3 2 1 0
3.	All chapter members are given basic instruction in leadership and opportunity to participate in organized competive events.	5 4 3 2 1 0
4.	A yearly program of activities is planned jointly by the students and the advisor(s).	5 4 3 2 1 0

I. Summary (A-H)

1. Commendable components:

2. Components requiring improvements:

3. Recommended action needed to improve the overall program:

Evaluators_____

_____

_____

_____

_____

Date:_____

Appendix B: Forms

To	Use form titled	Cited in
Begin yearly planning	(Example) Marketing Education Teacher-Coordinator Duties	I. Teacher-Coordinator Job Description
Develop your yearly plan	Marketing Education Teacher-Coordinator Duties	I. Teacher-Coordinator Job Description
Plan a budget	Budget worksheet	I. Program Management Reports
Apply for wage benefit	Request for Certification	I. Specialized Wage Regulations
Plan teacher time	Extended contract worksheet	I. Program Management Reports
Document time spent	Extended contract documentation	I. Program Management Reports
Tell people where you are	ME Off-Campus Form	
Register students in program	ME Program Application/ME Program Guidelines (2 pages) Interview Worksheet ME Job Interviews and Placements	I. Recruitment
Initiate, continue course management system	Marketing Education Calendar	II. Course Management
	Daily Lesson Record	II. Course Management System
	Weekly Training Log	II. Course Management System
	Weekly Marketing Journal	II. Course Management System
	Daily Operating Procedures	II. Course Management System
	ME Orientation	II. Course Management System
	Memo: Personal Styles and Preferences (learning styles)	II. Course Management System
	Memo: Marketing Terminology (writing sample)	II. Course Management System
Set up, maintain student file	Marketing Education Student File Student Data Sheet	
Invite parents to meeting	"You are cordially invited..." (adaptable by teacher)	I. Recruitment

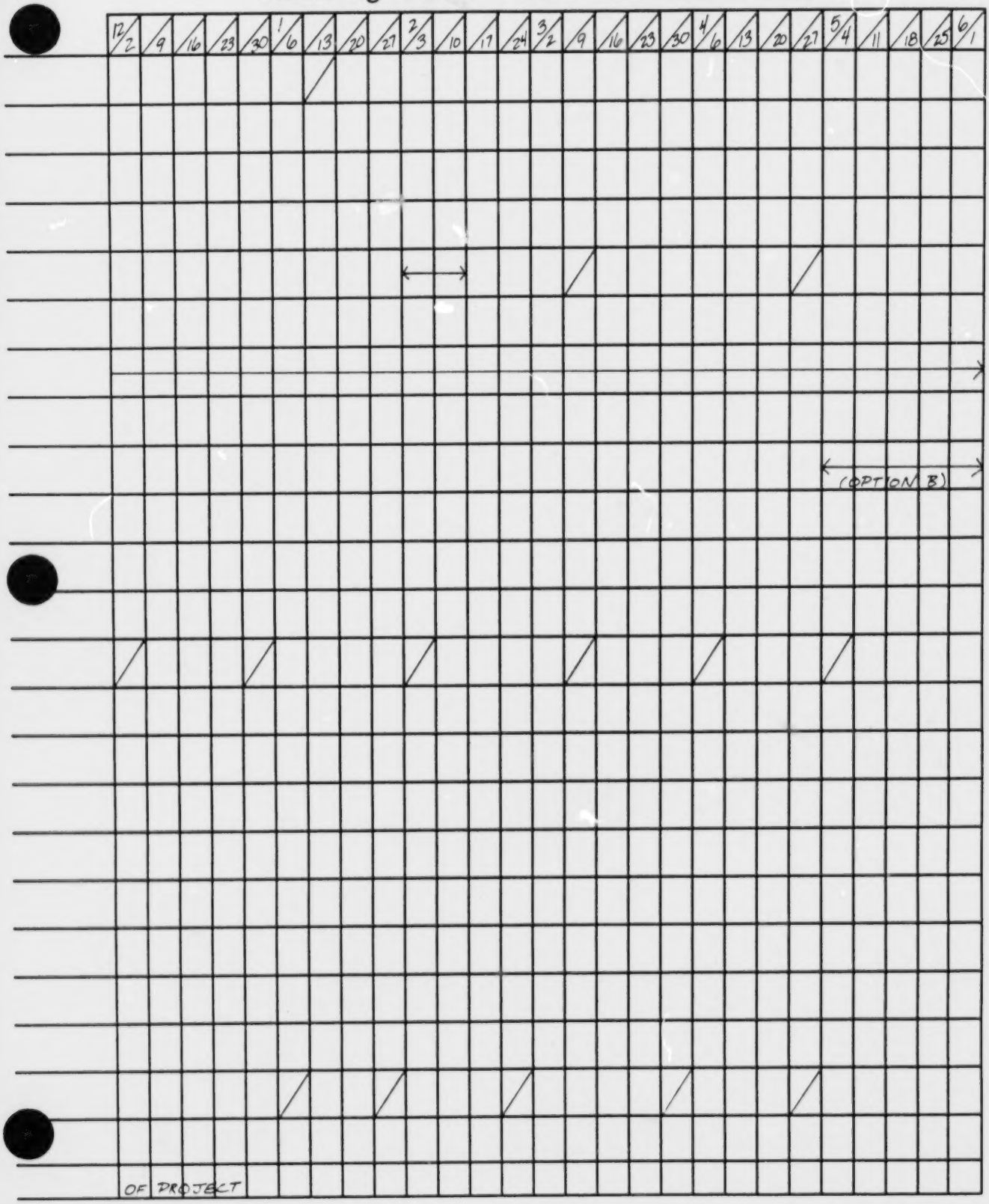
Coordinate on-the-job experience	Coordination Techniques ME Job Interviews and Placements Marketing Education Coordination Report Job Performance Evaluation		
Plan for, manage DECA	DECA Chapter Management Calendar Student Permission Form	III.	DECA Chapter Management
Assist students in preparing article summaries	Periodical Review		
Get input from students	Concern/Proposal Record		
Advise EIMC-ER on updates	Feedback form for *Program Management Guide*		

* These and other forms and materials for copying can be placed in plastic sleeves for protection.

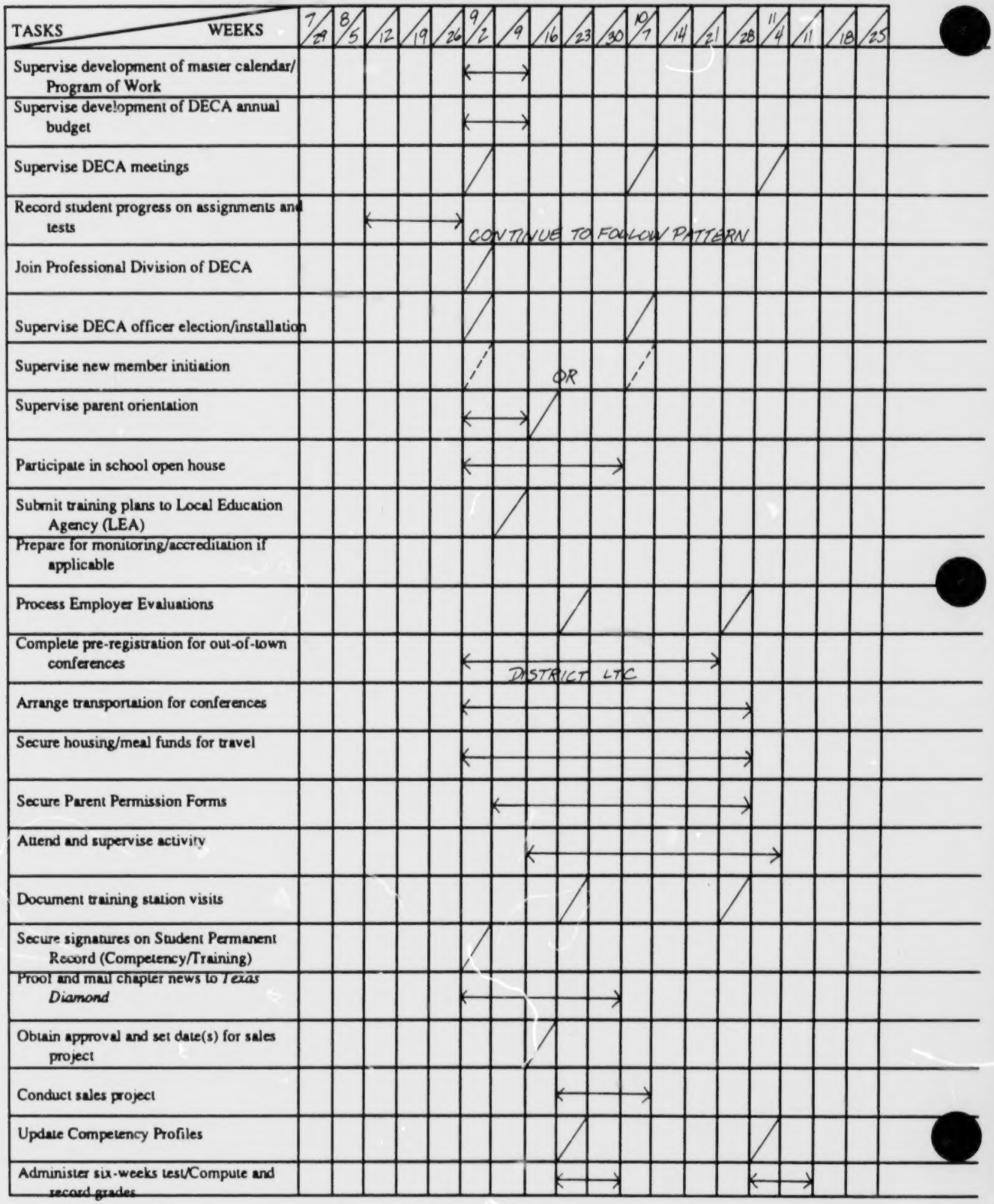
Marketing Education Teacher-Coordinator Duties

TASKS / WEEKS	7/29	8/5	12	19	26	9/2	9	16	23	30	10/7	14	21	28	11/4	11	18	25
Proof and mail article to *New Dimensions*	/																	
Attend Professional Improvement Conference (PIC)	←	→																
Join professional organizations (MET, MEA, AVA, TVTA, TVC)	←	→																
Recommend members for Local Advisory Committee			/															
Prepare out-of-town travel reports			/							←							→	
Prepare classroom and equipment layout	/																	
Plan and coordinate school store activities	←																	
Prepare yearly sequence of instruction	←	→																
Review and order new instructional materials	←			(OPTION B)							→							
Review special populations materials and reports	←	→																
Plan and secure guest speakers		←	→			CONTINUE TO FOLLOW PATTERN												
Plan and conduct field trips		←	→			CONTINUE TO FOLLOW PATTERN												
Plan and construct bulletin boards and displays		/				/				/				/				
Prepare necessary resource materials for individual assignments	←	→																
Write and submit weekly lesson plans			←	→		CONTINUE TO FOLLOW PATTERN												
Perform daily instructional planning		←	→			CONTINUE TO FOLLOW PATTERN												
Counsel students	←		→			CONTINUE TO FOLLOW PATTERN												
Develop and duplicate grading system for distribution to students		/																
Perform assigned school duties	←		→			CONTINUE TO FOLLOW PATTERN												
Present grading system orientation			/															
Secure parent release forms			/															
Supervise executive committee meetings					/					/				/			/	
Supervise standing committee meetings					←						→	AS NEEDED						
Supervise project committee meetings					←						→	AS NEEDED UNTIL COMPLETION						

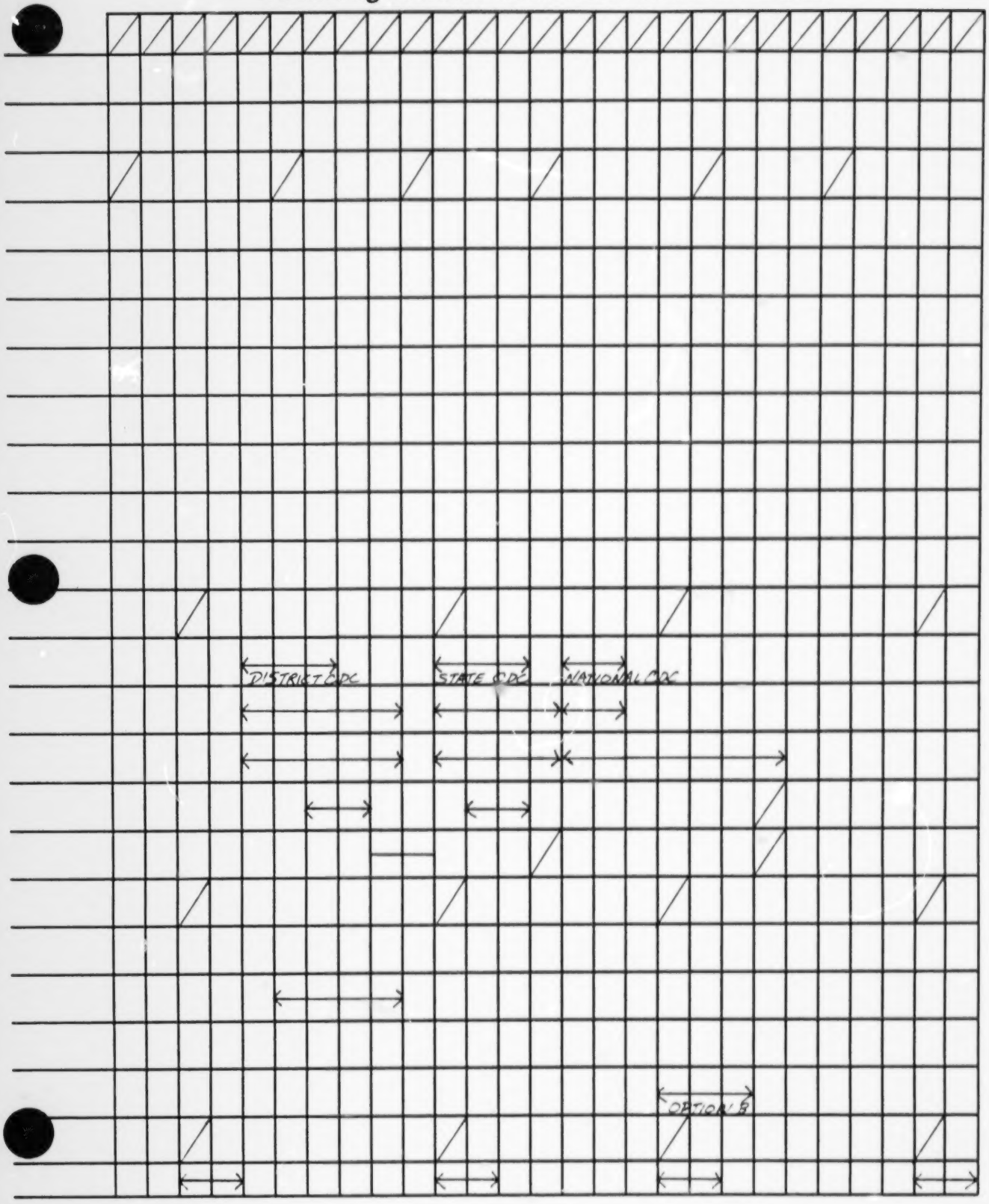
Marketing Education Teacher-Coordinator Duties



Marketing Education Teacher-Coordinator Duties



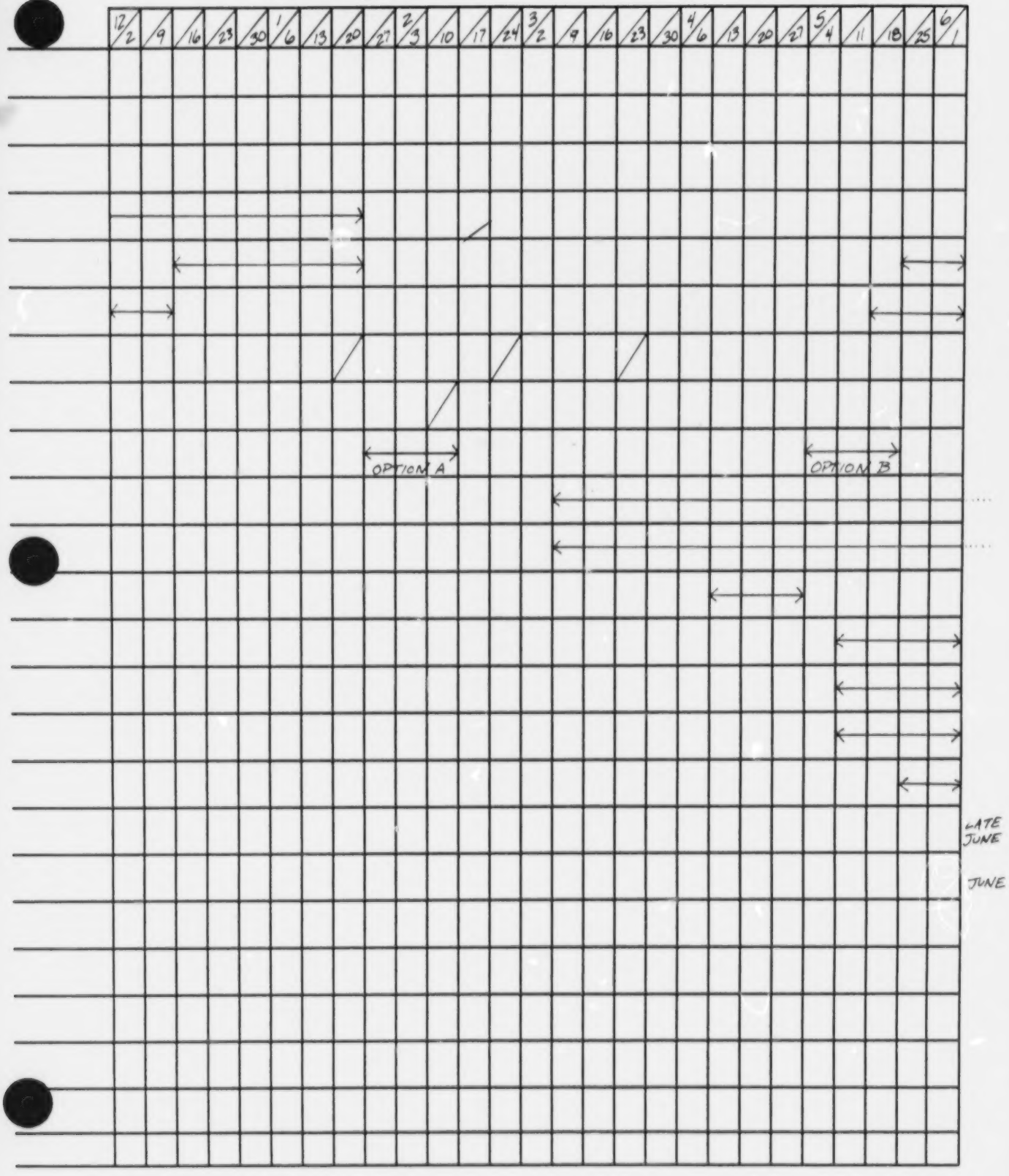
Marketing Education Teacher-Coordinator Duties



Marketing Education Teacher-Coordinator Duties

TASKS / WEEKS	7/29	8/5	12	19	26	9/2	9	16	23	30	10/7	14	21	28	11/4	11	18	25
Consider participation in Southern Region DECA LTC											←	→						
Submit DECA roster and dues to state advisor												←	→			→		
Supervise DECA civic activity															←			→
Encourage and assist in preparation for DECA CDC														←	→			
Administer semester exams/Compute and record grades																		
Sponsor DECA social activity																		
Proof and mail DECA Written Event Manuals for Competition																		
Supervise DECA Week Promotion																		
Supervise employer appreciation event																		
Recruit students for next year	→	→	→															
Interview, select, and place students for next year	→	→	→	→	→	→												
Prepare Follow-Up Reports on previous year's students																		
Complete Inventory of fixtures and equipment																		
Prepare ME Program Budget and Extended Contract Plan																		
Conduct Local Program Evaluation																		
Complete campus end-of-year reports																		
Attend Marketing Conclave																		
Investigate Professional Development opportunities-MarkED																		

Marketing Education Teacher-Coordinator Duties



Marketing Education Teacher-Coordinator Duties																						
Tasks Weeks>																						

Marketing Education Teacher-Coordinator Duties

Budget Worksheet

Prepared by _____

Prepared for _____

Date prepared _____ **for the school term of 19__ - __**

Beginning Balance	_____
Anticipated Income	
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
	_____
Anticipated Expense	
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
	_____
Estimated Ending Balance	_____

_____

Official Approval

Request for Certification

Store_____

Address_____

Telephone_____

Date _____

We are requesting certification under TJTC (Targeted Jobs Tax Credit) Program for the following person(s):

NAME	SOCIAL SECURITY #	START DATE	PHONE #

Signature of Authorized Representative_____

Position _____

Date _____

Extended Contract Worksheet

Prepared by _____

Program _____

Date prepared _____ **for the school term of 19___ - ___**

Number of days employed _____

Program Goal Statement:

_____

_____

_____

Extended Contract Objectives:

_____

_____

_____

_____

_____

_____

Strategies for Meeting Objectives:

_____

_____

_____

_____

_____

_____

_____

Extended Contract Documentation

Prepared by _____

Program _____

Date prepared _____ **for the school term of 19___ - ___**

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00					
9:00					
10:00					
11:00					
Noon					
1:00					
2:00					
3:00					
4:00					

Special comments: _____

_____

_____

_____

_____

_____

_____

MARKETING EDUCATION
Off-Campus Form

DATE:_____

TIME:_____

I will be off campus for the following reason(s):

_____ Coordination/Client Visits
_____ DECA Conference
_____ Meeting
_____ Field Trip
_____ Other_____

I may be reached at one of the following places:

Place	Phone:

I will return at_____

_____
Teacher's signature

Developing Future Leaders for Marketing and Management

MARKETING EDUCATION
Off-Campus Form

DATE:_____

TIME:_____

I will be off campus for the following reason(s):

_____ Coordination/Client Visits
_____ DECA Conference
_____ Meeting
_____ Field Trip
_____ Other_____

I may be reached at one of the following places:

Place	Phone:

I will return at_____

_____
Teacher's signature

Developing Future Leaders for Marketing and Management

Marketing Education Program Application
_____ High School

Personal Data

Name _____ _____ Date _____

Date of Birth _____ Social Security # _____ Grade _____

Mail Address _____ Home Phone _____

Father _____ Occupation _____ Employer _____

Mother _____ Occupation _____ Employer _____

School Data for CURRENT YEAR (19__-__)

	COURSE	TEACHER	MID-TERM GRADE
1st			
2nd			
3rd			
4th			
5th			
6th			
7th			

Days absent this year? _____ Why? _____

Days in detention/SAC/Saturday School? _____ Why? _____

Extracurricular activities during high school? _____

_____

Courses planned for next year? _____

Job Training Data

Current employer _____ Your job _____ How long _____

Have you worked elsewhere? _____ Where? _____ How long? _____

Have you ever been fired from a job? __ Explain _____

What is your career objective? _____

How will being enrolled in the Marketing Education Cooperative Education Program help you to attain your goal?

_____

What are your immediate plans after high school? _____

Marketing Education Program Guidelines

for cooperative education students of _____ High School

ENROLLMENT QUALIFICATIONS:

- 16 years old or over
- Junior or senior classification
- Good attendance record

TRAINING STATION QUALIFICATIONS:

- Retail, wholesale, or service selling business
- 15 hours per week
- Customer contact

PROGRAM GUIDELINES:

- Job placement is approved by teacher-coordinator.
- Students accept jobs for the school term. Job changes are subject to teacher recommendation.
- Training stations are extensions of the classroom. School rules apply.
- Students not following school rules may be detained from work.
- Students missing school for any reason must have approval of teacher-coordinator before reporting to work on that day.
- Students will notify teacher-coordinator and training sponsor before absence no later than 9:00 a.m. on the day of absence.
- Students will dress appropriately for school and in accordance with guidelines of training station.
- Students will be prompt and regular in attendance at school and on the job.
- Students will be honest and trustworthy at school and on the job.
- Students will not remain on campus after completing their scheduled classes without approval by teacher-coordinator.
- DECA is a vocational youth leadership organization which supports curriculum and training station activities. **All Marketing Education students are expected to participate in and support the DECA chapter activities.**
- Students are selected to travel and represent our school and chapter in leadership and competitive activities based on classroom performance, progress on the job, spirit of cooperation, competitive attitude and responsible behavior. All students are eligible and encouraged to participate in competition in accordance with district eligibility guidelines.

Important Notice: Students are subject to dismissal from the Marketing Education/DECA program at any time when failing to cooperate with the above stated guidelines.

Students and parents are encouraged to request a conference with the teacher/coordinator and/or school counselor if major problems arise. Problems are merely challenges looking for solutions. Finding solutions is a specialty of marketing experts.

As a cooperative education student, I understand that I must act with respect for myself and the rights of others, and that I am responsible for my actions while following the guidelines of my teacher and employer. I understand that honesty, regular and prompt attendance at school and on the job, as well as personal neatness are requirements for being in a cooperative education program.

I have made the following arrangements for transportation to and from work.

_____

Signed _____ Date_____

As a parent, I pledge support for the program outlined above, and agree to work with the school and employer as necessary to help my student's progress.

Signed _____ Date_____

The Marketing Education Program of _____ High School is offered to all junior/senior students without regard to race, sex, national origin, or nonrestricting handicap.

Interview Worksheet

Prepared by_____

Interviewing_____

Date _____ **for the school term of 19**_____ - _____

Why are you applying for the Marketing Program?_____

_____

With whom do you live?_____

What previous work experience have you had?_____

_____

Where are you working now?_____

What transportation will you use if placed in the ME Program?_____

Do you speak any language other than English?_____

Do you plan to go to college?_____

Do you plan to enter the military? _____

What career plans do you have?_____

Tell me about your school attendance record._____

Tell me about your discipline record._____

Tell me about your general health._____

Tell me about your hobbies._____

What type of training station would you like to have?_____

What do you know about the Marketing Program rules and regulations/expectations?_____

_____

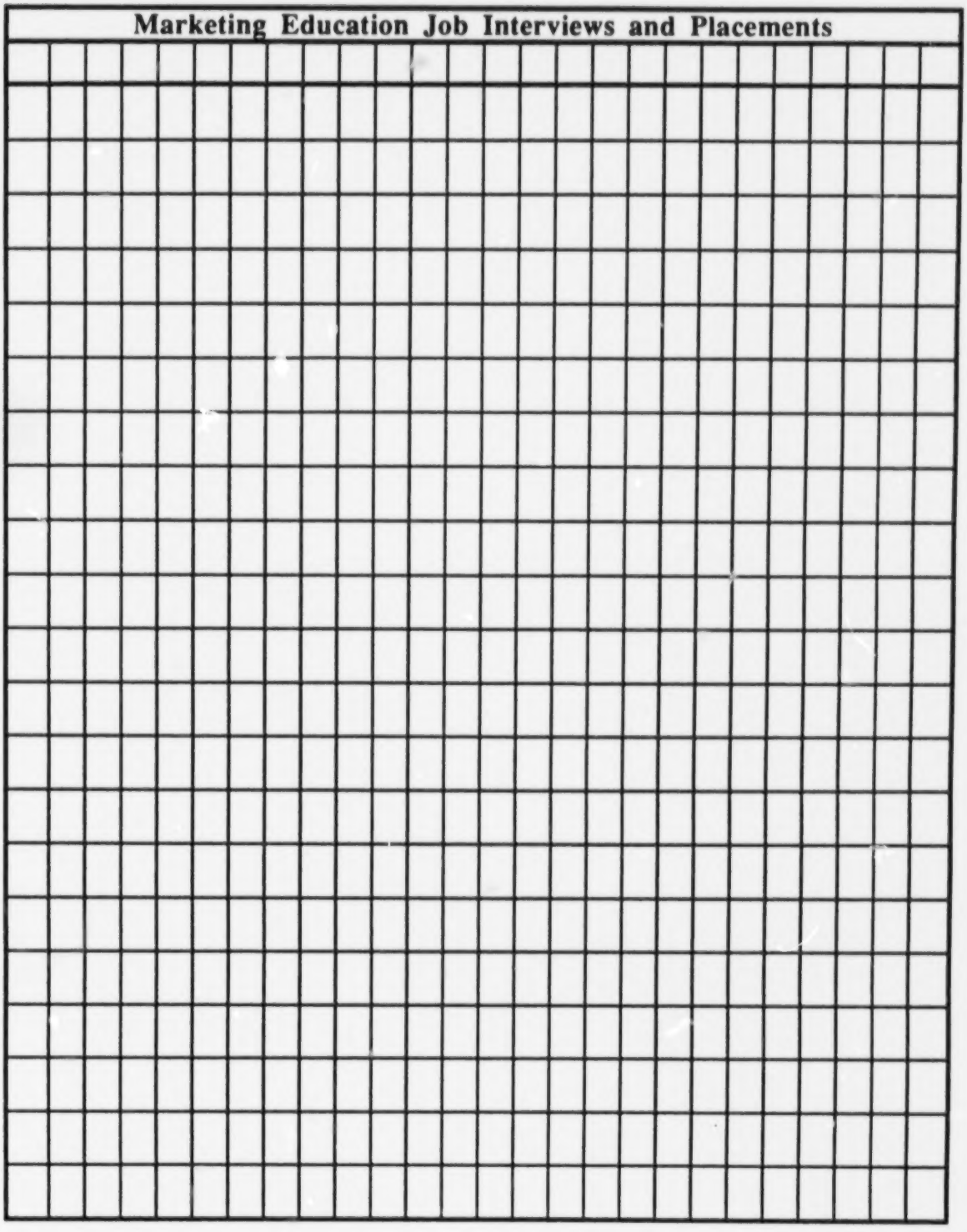
What do you know about DECA?_____

Are you willing to join DECA and pay $____ dues annually if selected for the ME Program?____

What type of books have you read in the last year?_____

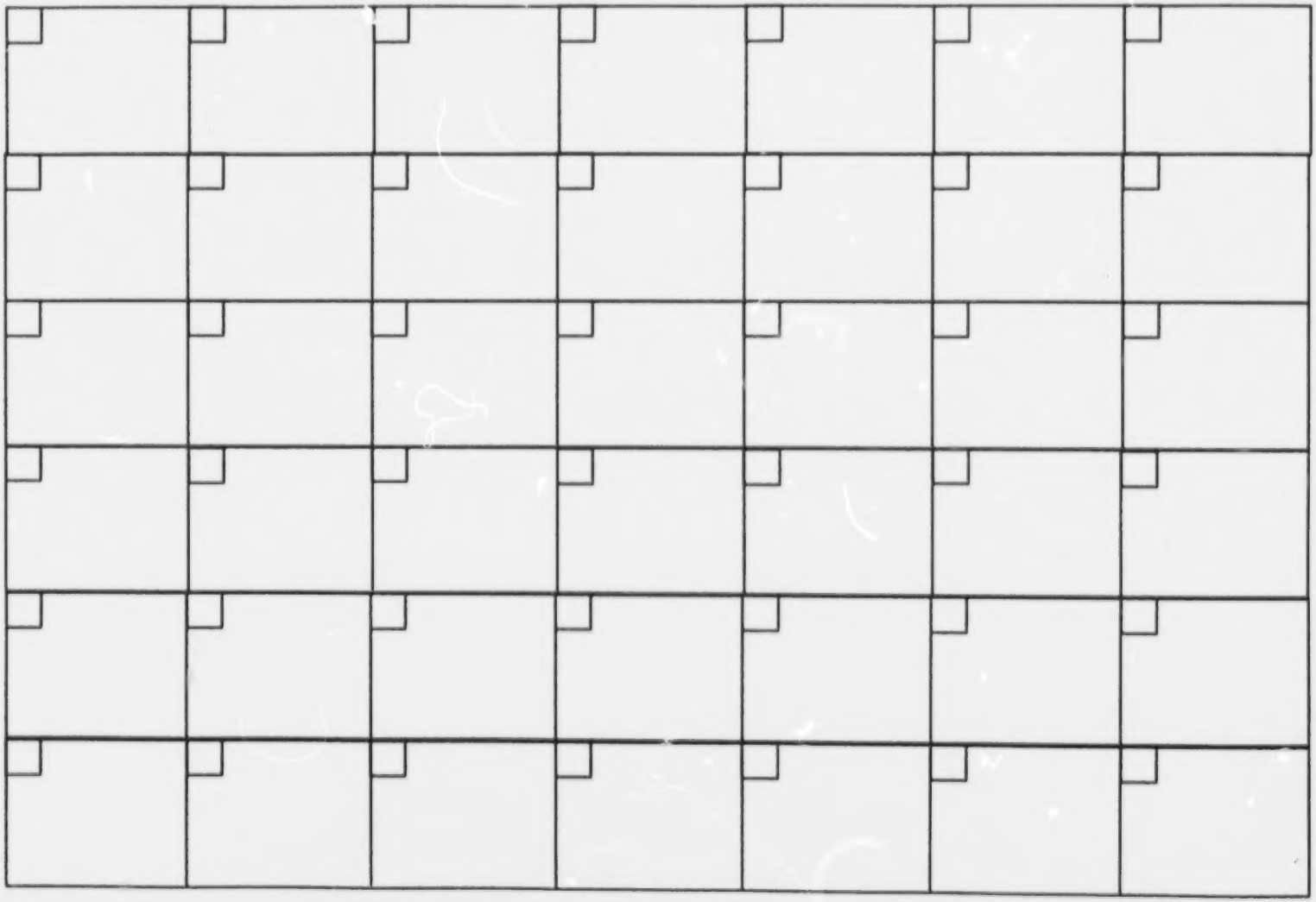
Sell me something._____

Marketing Education Job Interviews and Placements																		
Students **Training Stations**																		
(Continued)																		


Marketing Education Job Interviews and Placements

Marketing Education Calendar

Name_____ Course_____ Date_____



Notes:_____

Marketing Education Calendar

Name_____ Course_____ Date_____

	Su	M	T	W	R	F	Sa
I:1	X	X Teacher Preparation Day	8/20 T-37 Welcome Orientation worksheet	8/21 T-37 Instructional Format worksheet	8/22 T-23 Training Station Individual Study Format worksheet	8/23 T-14 DECA Opportunities worksheet	X
I:2	X	9/26 Quiz S SAE Assessment	8/27 T-15, 16 ch. 9 "Communication Skills" notes	8/28 T-17 ch. 9 cont'd. application	8/29 T-11, 20, 22 ch. 10 "Interpersonal Skills" notes	8/30 T-27-8, 32, 34-5 ch. 10 cont'd. application	X
I:3	X	H Labor Day Holiday	9/3 Quiz ch's. 9, 10 S "Opportunities Unlimited" - project	9/4 T-19, 20, 24 ch. 11 "Management Skills" notes	9/5 T-25-6, 31, 33 ch. 11 cont'd. application	9/6 T-34, 35 ch. 11 cont'd. application S "Opportunities Unlimited" - project	X
I:4	X	9/9 Quiz ch. 11 P Prep for ME-LTC	9/10 P ME Leadership Training Conf. fieldtrip.	9/11 T-2 ch. 1 "Intro. to Economics" notes	9/12 T-36, 38 ch. 1 cont'd. application	9/13 Quiz ch. 1 S "Opportunities Unltd." project	X
I:5	X	9/16 T ch. 2 "Free Enterprise System" notes	9/17 T-1, 2, 3, 4, 5 ch. 2 cont'd. application	9/18 T-36, 41-2, 45 ch. 2 cont'd. application	9/19 Quiz ch. 2 S prepare oral report	9/20 P "Opportunities Unltd." Oral Reports	X
I:6	X	9/23 T-1, 3, 19 ch. 4 "What is Business" notes	9/24 T-36, 41-2-3-4 ch. 4 cont'd. application	9/25 Quiz ch. 4 S mint/LS	9/26 S mint individual studies	9/27 EXAM Comprehensive 6-weeks Test	X

Notes:_____

MARKETING EDUCATION I

DAILY LESSON RECORD - 19__
Week of _____

GP/WK/D	CORE/COMMON ESSENTIAL ELEMENT	OBJECTIVES	REFERENCES FOR CLASS NOTES	WRITTEN ASSIGNMENTS	CHECKING MASTERY

SPECIAL NOTES: _____

Weekly Training Log for _____

GP/WK/D	Time In	Time Out	Total Hours	Comments
GRAND TOTAL HOURS FOR WEEK				

Weekly Marketing Journal

Monday

Tuesday

Wednesday

Thursday

Friday

WEEKLY MARKETING JOURNAL FOR _____

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

Daily Operating Procedures

Task	Source
Teacher Days:	
1. Record data in class notes	OH/CB/Text
2. Demonstrate mastery	*Mastery Chart*
3. Perform guided activity	WS/Group
4. Review written assignment	HO
5. Sponge	Oral
Student Days:	
1. Remediate/Retest	CCF/Test File
2. Select specialized subtopic assignment	TP
3. Prepare assignment	SSF
4. File completed assignment	T-IB
Test Days:	
1. Complete test in allotted time	Teacher
2. File completed test/answer sheet	T-IB
3. Proceed as on a student day	SSF
Professional Days:	
1. Follow appropriate dress code	*DC Chart*
2. Greet guests w/handshake-introduction	student
3. Pay courteous attention to presentation	speaker
4. Record brief notes reviewing presentation	CCF

Key to Source Codes

OH	Overhead
CB	Chalkboard
WS	Worksheet
HO	Handout
CCF	Core curriculum folder
TP	Training plan
SSF	Specialized subtopics folder
T-IB	Teacher in-basket

Marketing Education—Room __
_____ HIGH SCHOOL
Orientation

Administrative Details:

Forms to be completed (with signatures) and returned on or before: _____

_____

_____

_____

Classroom Operating Procedures to be mastered and tested on: _____

_____

_____

_____

Curriculum Details:

Marketing Education Grading Plan to be mastered and tested on: _____

Competency Record/Training Plan to be mastered and tested on: _____

Filing System to be mastered and tested on: _____

Training Details:

Competency Record/Training Plan to be mastered and tested on: _____

Employer Evaluation to be mastered and tested on: _____

Cooperative Training Agreement to be mastered and tested on: _____

Co/Extracurricular Details:

DECA leadership opportunities to be mastered and tested on: _____

DECA competition opportunities to be mastered and tested on: _____

_____

Based on the conditions put forth in the above mentioned documents, I hereby state my intentions to participate in the Marketing Education Program for the school term of 19__ - __.

I further agree to abide by the guidelines for classroom, on-the-job training and DECA participation as set forth in the above listed documents.

I understand that by accepting the opportunities afforded me through the Marketing Education Program, I will enhance my general level of education, my earning power, and my citizenship skills.

_____ _____

Date Student signature

_____

Parent signature

MEMO

DATE:

TO: Marketing Education Students

FROM:

SUBJECT: Personal Styles and Preferences

In each of the following lists, please rank your first, second, and third choices by placing a 1, 2, or 3 in the blank before each item.

Based on the premise that I need to master the material presented in my classes, I prefer to:

_____ read a chapter
_____ take notes from a lecture
_____ see a demonstration

_____ answer chapter questions on paper
_____ discuss ideas from the lesson
_____ prepare a project related to the lesson

_____ watch a movie/video and take notes
_____ hear a guest speaker and have discussion
_____ go on a field trip

_____ take true/false, multiple choice, and short answer tests
_____ take tests with essay and discussion questions
_____ present an oral report with visual aid

_____ do all of my assignments independently
_____ do some of my assignments in groups
_____ do most of my assignments in groups

_____ work on projects/homework in quiet, private place
_____ work on projects/homework with others nearby
_____ work on projects/homework with music playing and others nearby

_____ study for tests alone
_____ study for tests with a friend
_____ study for tests in a group

_____ study for tests by reading my notes or the text
_____ study for tests by reviewing material orally
_____ study for tests by rewriting material

_____ conduct a project by reading and writing
_____ conduct a project by interviewing and writing
_____ conduct a project by constructing a model

_____ serve as the recorder for a group project
_____ serve as the leader for a group project
_____ serve as a worker in a group project

MEMO

DATE:

TO: Marketing Education Students

FROM:

SUBJECT: Marketing Terminology

Please write a story (paragraph) telling about something that happened at Wal-Mart. The story may be based on a real-life experience or it may be entirely fictitious. Please use at least ten (10) terms from the following list in your story. Feel free to use various forms of these terms (e.g. advertise, advertising, advertisement, advertised). Write on the back of this sheet if you need more space.

advertise	management	planning
buyer	marketing	risk
commercial	policy	sale
customer	product	sell
discount	promotion	service
display	price	value
finance	profit	warranty

You are cordially invited
to an informal gathering
featuring
Marketing Education students
presenting
answers to your questions
about
Marketing Education Program Guidelines

Marketing Education Room _____
_____ HIGH SCHOOL

_____, 19_____

_____ p.m.

To the parent/guardian of_____

The purpose of the above mentioned gathering is to acquaint you with the opportunities available for your student in our Marketing Education Program at_____ High School. As students begin to complete their schedule requests for the coming year, it is important for them to fully recognize how our program can help them to reach their career objective.

We are happy to have current students who are eager to share their reports about benefits of the Marketing Education Program. Many of the students have received on-the-job training for school credit; however, some have been enrolled in our semester courses and have not had a job connected to their school credits. Both groups of students have been eligible to join our vocational student organization, DECA, and participate in the leadership and competitive activities which DECA sponsors.

Because the opportunities of our Marketing Education Program are unique, and because many of the opportunities have corresponding responsibilities, we ask you to attend our informational meeting as scheduled. Following our session, if you and your student agree that enrolling in one of the cooperative education courses is appropriate, you may turn in the application at that time. If you are unable to attend our meeting, please call me at_____ to schedule a private conference at your convenience. For the semester courses, a conference is welcome, but not required.

Please plan to join us in my classroom for snacks and an informal visit.

Thank you,

1991-92 Marketing Education Student File for _____

ITEM / DATE	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	
Application											
Parent Interview											
Job Placement											
Class/Work/Organization Schedule											
Permission/Medical Release Form											
Student Permanent Record											
Training Plan Agreement											
Competency Record/Training Plan											
ME Handbook signatures											
School Supplies fee											
DECA Initiation Guidelines											
DECA dues											

1991-92 Marketing Education Student File for _____

Student Data Sheet
_____ High School Marketing/DECA
19__-__

Student Name _____ Grade _____ Locker _____

Class Schedule:

Period	Subject	Teacher	Room
1			
2			
3			
4			
5			
6			
7			

Teams/Organizations:

Name	Sponsor	Room

Regular Work Schedule:

Day	Regular	Alternate
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Transportation: _____

Coordination Techniques

The list which follows includes a variety of techniques used when making coordination visits with training sponsors or others. For your convenience in documenting visits, space has been left for codes to be assigned for each technique. After filling in dates across the top of the ME Coordination Report, and listing names of training sponsors and other significant individuals in the column on the left of that report, the teacher-coordinator may then simply record the appropriate code in the appropriate block to indicate what was done, when, and with which individual. Additional coordination techniques may be added to the following list as individual situations demand.

_____ Develop training station

_____ Individualize training plan for student trainee

_____ Discuss progress of actual training and record on training plan

_____ Modify training plan to include new experiences

_____ Share encouragement related to trainee's academic performance

_____ Review trainee's on-the-job evaluation

_____ Invite training sponsor to serve as guest speaker/field trip presenter

_____ Field trip to training station

_____ Invite training sponsor to assist with DECA competition training

_____ Invite training sponsor to serve as judge for DECA competition

_____ Invite training sponsor to provide current market perspective on curriculum issues

_____ Photograph student/trainee with training sponsor

_____ Introduction by student/trainee to co-workers

_____ Student/trainee performs task demonstration for classmates

_____ Deliver appreciation gift

_____ Show snapshots of student/trainee involved in school project, DECA event, leadership role

_____ Discuss student/trainee problems related to school/work experiences; formulate action plan

_____ Get signature on forms

_____ _____

_____ _____

Marketing Education Coordination Report

Tasks	Weeks																							

Marketing Education Coordination Report

JOB PERFORMANCE EVALUATION
Marketing Education - _____High School

Student_____Training Station_____ Date_____

As a Marketing Education Training Station, your business is considered a laboratory (1) for practicing Marketing principles learned in the classroom and (2) for introducing additional job-related activities necessary for competency in the student's career objective. *Your student-trainee's grade is based on a combination of his/her performance in the classroom and on-the-job.*

Thank you for taking time to train, encourage, and evaluate a Marketing student-trainee. Please circle the appropriate number in each category below to indicate the level of mastery or performance of your student-trainee.

1. Knows job responsibilities:

1-2	3-4-5	6-7-8	9-10
doesn't know overview	knows overview only	knows most details	knows all details

2. Industry:

1-2	3-4-5	6-7-8	9-10
never works hard	sometimes works hard	usually works hard	always works hard

3. Quality of work done on routine tasks:

1-2	3-4-5	6-7-8	9-10
never neat &/or accurate	sometimes neat &/or accurate	usually neat & accurate	always neat & accurate

4. Enthusiasm for job:

1-2	3-4-5	6-7-8	9-10
dislikes job	indifferent to job	interested in job	very enthusiastic to job

5. Supervision required on routine tasks:

1-2	3-4-5	6-7-8	9-10
needs constant supervision	needs some supervision	finishes assignments with little supervision	finishes assignments & takes initiative

6. Judgment shown on the job:

1-2	3-4-5	6-7-8	9-10
poor	usually correct but lacks confidence	usually correct and with confidence	clearly outstanding for level of training

7. Use of human relations skills:

1-2	3-4-5	6-7-8	9-10
seldom tactful, poised	tries to be tactful	often tactful, poised	always tactful, poised

8. Appearance and grooming:

1-2	3-4-5	6-7-8	9-10
never cheerful, neat	sometimes cheerful, neat	usually cheerful, neat	always cheerful, neat

9. Response to suggestions made by your supervisor:

1-2	3-4-5	6-7-8	9-10
rejects suggestions	accepts suggestions	welcomes suggestions	asks for suggestions

10. Results of suggestions:

1-2	3-4-5	6-7-8	9-10
no improvement	slow improvement with supervision	steady improvement with supervision	steady improvement without supervision

Signature of Training Sponsor/Evaluator _____

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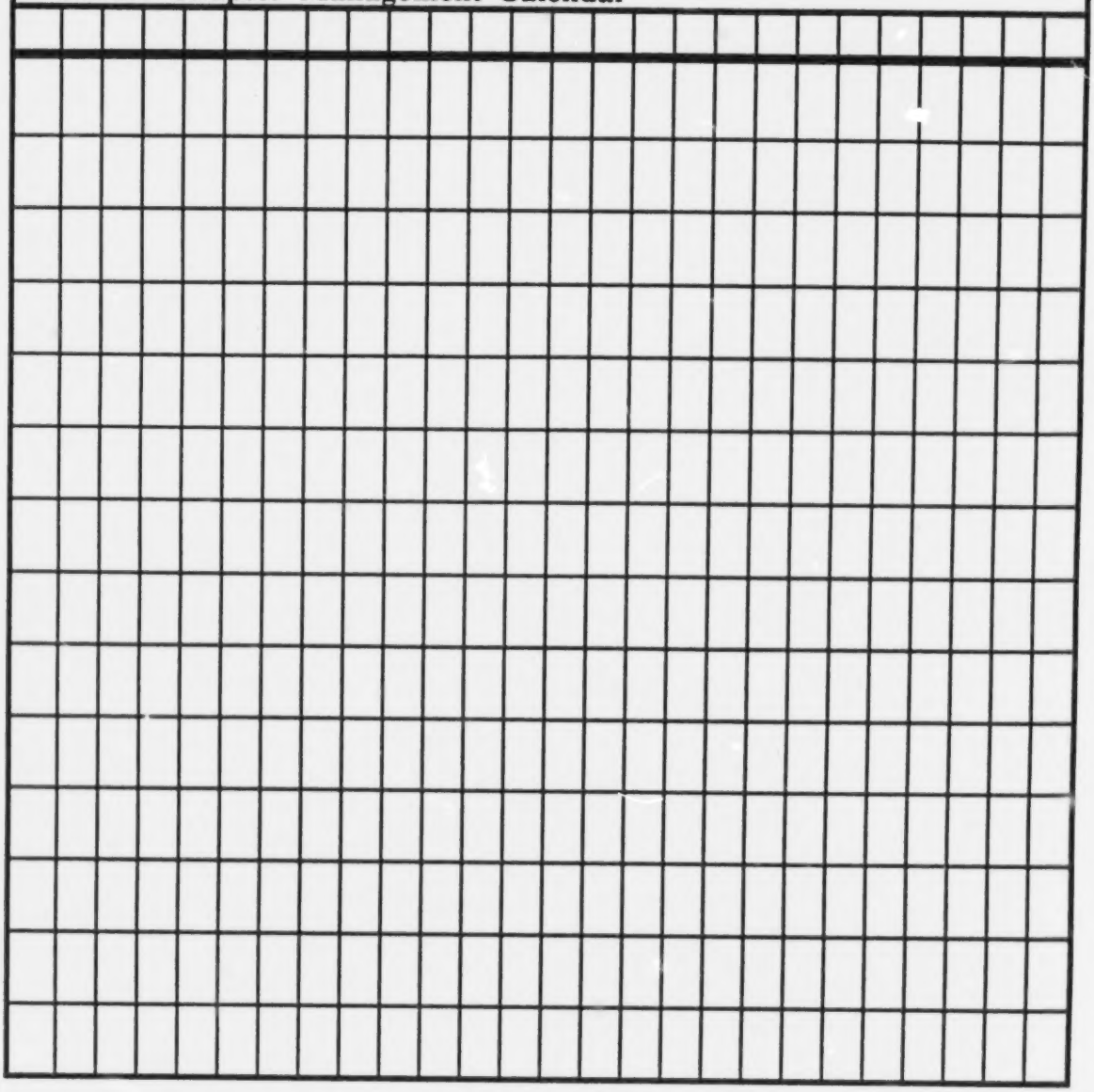
DECA Chapter Management Calendar																	
Tasks Weeks>																	
(Continued)																	

DECA Chapter Management Calendar



STUDENT PERMISSION FORM

I give my permission for my child_____
to participate in the_____ HIGH SCHOOL MARKETING EDUCATION PROGRAM including trips and activities during the 19____-_____ school year.

I understand and have satisfied myself that he/she will be adequately chaperoned both on the way and while at the meetings, and normal precautions will be taken in the interest of his/her safety and well-being. I understand and accept the fact that neither the school nor its personnel will be held responsible in any way for accidents, misfortunes, or disobedience, and misconduct of my child which might occur in connection with such trips and activities.

My child is being permitted to participate in these trips and activities with my consent and approval. My signature constitutes permission for the above named student to be treated for a medical and/or surgical emergency by a private physician or at a hospital at my expense.

_____
PARENT OR GUARDIAN

_____
HOME PHONE NUMBER

_____
WORK PHONE NUMBER

HOME ADDRESS_____

_____

_____

EMERGENCY INFORMATION:

Allergies, illness, other limiting physical conditions_____

Medication/treatment for above_____

Health insurance company_____

Health insurance policy number_____

Health insurance policy issued to_____

Emergency name(s) and phone number(s)_____

_____ _____High School

_____ _____

PERIODICAL REVIEW

Title of Article_____

Author_____

Publication_____

Date_____

Main point of article_____

_____

Summary_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Conclusions/Opinions_____

_____

_____

_____

_____

Concern/Proposal Record
Marketing Education/DECA

Student Name:_____ Date:_____

Concern:_____

_____

Related facts:_____

_____

Proposal:_____

_____

Expected Results:_____

_____

Disposition:_____

_____

Signed (student):_____

Signed (teacher):_____

Concern/Proposal Record
Marketing Education/DECA

Student Name:_____ Date:_____

Concern:_____

_____

Related facts:_____

_____

Proposal:_____

_____

Expected Results:_____

_____

Disposition:_____

_____

Signed (student):_____

Signed (teacher):_____

Feedback Form for *Program Management Guide*

The purpose of this guide is provide a central document which suggests strategies for developing Marketing Education Programs of the highest quality. Toward that end, this page is provided to encourage ongoing teacher input. Please copy this form and mail your ideas and suggestions to UT-EIMC. As updates are feasible, your input will be most valuable.

Are there items that need to be corrected or made more current?_____

_____

_____

_____

_____

Are there items that need to be included in a wider variety? (e.g. Job Performance Evaluation forms)_____

_____

_____

_____

Is there a content area that should be added?_____

_____

_____

_____

_____

Is there an existing content area that needs to be strengthened? In what way?_____

_____

_____

_____

_____

Please send your suggestions to:

ME Curriculum Specialist
Educational Resources/EIMC
The University of Texas at Austin
P.O. Box 7218
Austin, TX 78713-7218

Appendix C: Filing System

Filing Systems
Filing Matrix

Filing Systems

All successful operations must have an orderly and systematic method for storing and retrieving materials. The most effective method is the one which meets the needs of the user. Recognizing that each teacher-coordinator must approach filing from his/her individual point of need, no attempt is being made in this guide to suggest **the** method. The following ideas are presented as thought-starters and as a system for organizing the challenge into manageable divisions.

No matter what system is used, this warning needs to be heeded:

Do not throw any student records away. Follow-up needs to be done annually now, but may soon be required to be done for up to five years after graduation. Without student information, trying to create data lists would be quite difficult.

Using the journalistic approach, we will attempt to answer the WHO, WHAT, WHEN, WHY, WHERE, and HOW questions in relationship to filing.

WHO needs to file?
WHAT needs to be filed?
WHEN does the item need to be filed? disposed of?
WHY will the item be needed again?
WHERE should the item be filed?
HOW does the item relate to other items being filed?

WHO NEEDS TO FILE?

Students may and should be trained to file everything they use which is not confidential.
Teachers should file all confidential material and all items not handled by students.
Others who interact with ME programs will need to file selected pieces of ME materials. For example, training sponsors file training plans, evaluation instruments, invitations

WHAT NEEDS TO BE FILED?

Administrative materials: Reports, rules, guidelines, memos, from local, state, and federal offices
Instructional materials: Curriculum items of all kinds
Chapter materials: DECA items of all kinds
Professional materials: Membership items of all kinds

WHEN DOES THE ITEM NEED TO BE FILED? DISPOSED OF?

Time: before, during, or after class
Frequency: annually, by semester, by grading period, weekly, daily, by class period
Repetition: pending vs. final

WHY WILL THE ITEM BE NEEDED AGAIN?

Historical reference: Who said or did what, when?
Future planning: What worked, didn't work? What guidelines/deadlines should be followed?
Future action: What information, supplies, materials, equipment will be needed?

WHERE SHOULD THE ITEM BE FILED?

Location:
AV cart
Bookcase
Closet
Computer hard disk
Computer stand

Container:
AV cassette case
Basket
Box with lid
Brief case
Diskette case

Desk—classroom
Desk—office
Display counter
Easel
File cabinet
Open shelves
Rack
Suspended/Mounted
Table
Typing table

Drawer
Envelope
File folder
File pocket, File wallet
Folio
Hanging file
Library files
Picture frame
Plastic zip bag
Pocket folder
Spiral notebook
Three-ring binder

HOW DOES THE ITEM RELATE TO OTHER ITEMS BEING FILED?

Task sets: used simultaneously (budget/purchase order, individual study manuals)
Process sets: used in sequence (lesson plans w/support materials, DECA dues/roster)
Like-kind sets: used for similar purpose, independent action (quizzes, DECA financial reports)
Research sets: used for independent study (trade journals, newspapers, prior student work)
Support-function units: (curriculum guides, teacher manuals, AV items, manipulatives, etc.)
General supply items: (storage items, art materials, product samples, media samples)

WHICH WAY TO TURN, FIRST?

Before you begin: (This can be done in segments, but will be most rewarding if done quickly.)

- Make several copies of the ME Filing System Matrix which follows.
- Label one copy for each major category of materials listed under "WHAT" above (add new sheets in each category as needed).
- Borrow the custodian's largest trash container on wheels.
- Begin in one corner of your room/office, and look at each item/combination of items you find.
- Decide which item(s) are ready to be disposed of, and take that action immediately.
- Describe item(s) remaining in the "WHAT" column of the appropriate filing category sheet.
- Fill in the remaining columns on all sheets of the ME Filing System Matrix (many items will have several entries in several of the columns).
- Take time to study your matrix, looking for patterns that indicate likely groupings.
- Look for ways to streamline, simplify, eliminate effort.
- Begin again with clean matrix sheets for each category, and describe your best ideas.

Ready, set, go: (Visualize the entire space empty and ready to be filled with useful items ONLY.)

- Decide on an approach (related items, sections of the room, items in similar containers, etc.).
- Empty the area you are about to fill and clean it completely.
- Place the selected items, in the selected containers, into the selected location.
- Continue to throw away items which have not been used in several years.
- When you uncover "hidden treasures," add them to the matrix worksheet.
- As you complete one section, congratulate yourself and repeat the process.

A WORD OF WARNING!

Our STUDENTS are the top priority and focus for anything and everything we do as ME teacher-coordinators. All planning, organizing, and otherwise working should be done with one goal in mind—*maximize the opportunities for students to learn and have their needs met!*

"I've always done it this way" and "It's easier this way" are not good reasons for doing anything.

In the WHO category, the "others" who interact with ME programs should be considered when designing the items they will receive, store, and retrieve. The purpose of sending any item to a training sponsor, a parent, an administrator, or a guidance counselor is to enlist their aid (direct or indirect) in behalf of our students. It is essential, if the item we send is to receive priority attention, that whatever we send meet the following criteria: (1) look professional, (2) be easily identified as ME/DECA in a mountain of papers, and (3) ask for a response in a timely manner. Consider using MEA presentation folders and clip art to dress up your communications.

A WORD OF CONGRATULATIONS!

If your filing system is already in first-class condition, fantastic! If you are about to embark on the journey through and around the mountains within your classroom/office, fantastic! No trip will be more rewarding or bring to mind more of the great ideas from past times. Remember to keep the best and dump the rest. As you travel, set aside one or two really terrific/unique ideas to bring to the Share Session at PIC.

Marketing Education Filing Matrix for _____

WHO	WHAT	WHEN	WHY	WHERE	HOW RELATED

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

(1) acceptance policies on student transfers from other school districts;

(2) operation of school bus routes or runs on a non-segregated basis;

(3) nondiscrimination in extracurricular activities and the use of school facilities;

(4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;

(5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;

(6) nondiscriminatory practices relating to the use of a student's first language; and

(7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964; EXECUTIVE ORDERS 11246 and 11375; TITLE IX 1973 EDUCATION AMENDMENTS; REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulation by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs of activities which i) operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.

m•a•r•k•e•t•i•n•g
Marketing • Advertising Services • Apparel Marketing • Bu
of Logistics • Entrepreneurship (Marketing) • Fashion Me
Floristry Marketing • Food Products Marketing • Food Se
rketing • Health Services Marketing • Home/Office Produc
ng • Hotel Marketing • Industrial Selling • Insurance Mark
Marketing • Promotion and Publicity • Marketing Informati
ssional Selling • Real Estate Marketing • Retail Selling • S
g • Vehicle Marketing • Visual Merchandising • Wholesal
ices Marketing • Advertising Services • Apparel Marketing
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ervices Marketing • Promotion and Publicity • Marketing
Professional Selling • Real Estate Marketing • Retail S
Vehicle Marketing • Visual Merchandising •
Advertising Services • Apparel
preneurship(Marketing)
Products Marke
Home

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